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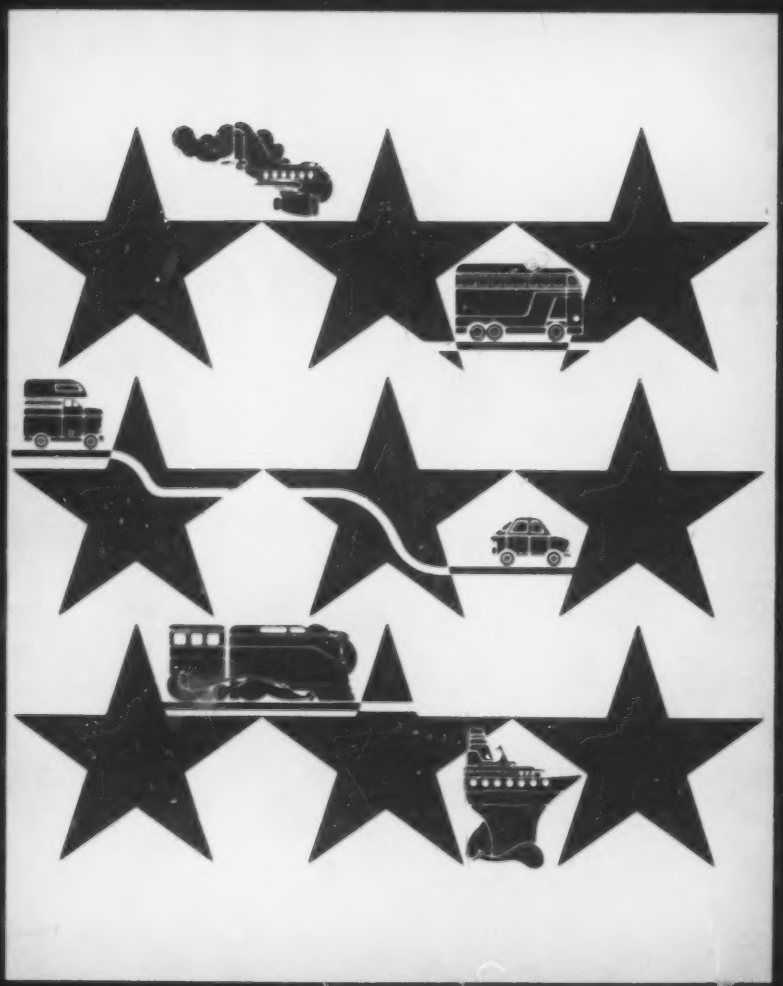
Data Center

Survey of State Travel Offices 1989-90



SURVEY OF STATE TRAVEL OFFICES

1989-1990

Washington, D.C.

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An Affiliate of the Travel Industry Association of America

The US Travel Data Center is the national, non-profit center for travel and tourism research. Since its establishment in 1973, the Data Center has devoted itself to advancing the common interests of the travel industry and the public it serves by encouraging, sponsoring and conducting statistical, economic, and scientific research concerning travel, the travel industry, and travel-related industries. In pursuit of this objective the Data Center gathers, analyzes, publishes and disseminates the results of such research, and cooperates with all government agencies, private industry and academic institutions with similar purposes and objectives.

The US Travel Data Center is an affiliate of the Travel Industry Association of America (TIA), the national, non-profit association representing all components of the United States travel industry, the third largest retail industry in the nation.

Dr. John D. Hunt, Chairman

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PREFACE

Governments in the fifty states and a number of U.S. territories fund agencies responsible for travel promotion and development. The responsibilities, structure and resources of these offices vary widely, and their impact on the state tourism economy is in many cases quite significant. Moreover, the operations of state travel offices have proven to be of interest to travel-related businesses, students of government, travel researchers, and organizations providing services to governmental units.

The most important need for understanding the variety of state travel development programs, however, is found among the state travel directors themselves. The exchange of information about programs and operations allows each director to compare their office with others; to learn of new, innovative programs; and begin to develop joint solutions to common problems. In 1973, the US Travel Data Center began to survey the operations of the state and U.S. territorial travel offices. The Survey of State Travel Offices 1989-90 is the seventeenth annual report in the series.

The report is based upon questionnaires completed by representatives of all of the state travel offices, and comparable agencies in the District of Columbia and two U.S. territories. Survey responses provide a detailed picture of the state travel office operations planned for fiscal year 1989-90, which for the majority of states runs from July, 1989 to June, 1990. Results parallel those of previous surveys, though not all questions are repeated every year.

The survey was conducted over August - November, 1989. Attempts have been made to clarify vague or unclear responses. Questions about individual replies should be directed to the relevant state travel office. As with all of its publications, the Data Center is interested in reactions to the format and subject matter covered in this report.

We wish to express our sincere appreciation to all state personnel who took the time to fill out the somewhat lengthy questionnaire. Their response is an excellent example of cooperation to improve communications and mutual understanding within the travel industry, and between the industry and the public. Nancy Mina compiled the tables of survey responses in this report. Kelly Repass conducted the data collection, editing and analysis of results, and prepared this report.

US Travel Data Center
Washington, D.C.
March, 1990

SUMMARY AND ANALYSIS

In early August, 1989, the US Travel Data Center sent its annual survey to the government travel offices in 50 states, and to comparable offices in the District of Columbia and five U.S. territories.

The questionnaire covers an extensive range of state travel office operations. It is intended to meet the informational needs of the state travel directors, as well as many private industry components.

Questionnaires were returned by all state travel offices, including two from Texas, Hawaii, Alaska and by the territories of American Samoa and Guam. Alaska is now represented by two agencies, as is Texas and Hawaii. In Alaska's 1988 Legislative session, legislation was passed creating the Alaska Tourism Marketing Council (ATMC). The Council is a public corporation of the state with a board of directors consisting of 21 members. The primary responsibility of the ATMC is to conduct the domestic tourism marketing program. Meanwhile, the Division of Tourism retains responsibility for international marketing, grants, and tourist development projects.

The term 'state' is used in this report to denote the state travel offices responding to the survey. As in reports published in the last several years, analysis of and reference to the territories and the District of Columbia in the narrative report is separate.

Complete answers were sought for all items to produce a comprehensive report. In some cases, blanks occur where answers are not available from the offices. In others, estimates are provided in lieu of actual figures by states when, for example, they are uncertain of how funds will be allocated among expenditure categories.

The tables of survey responses appearing on pages 19 - 93 are divided into eight sections. Tables are labeled by topic, and the list of topics is outlined in the Table of Contents.

Explanatory notes are given in the final table for each section. Survey responses in the tables marked with one or more asterisks (*) also reference further explanation in each explanatory notes/additional comments section.

Each year the survey requires state travel offices to categorize budgets for two fiscal years. For example, this report presents a breakdown of both the upcoming projected budgets for fiscal year 1989-90, as well as the actual expenditures for fiscal year 1988-89. States' actual budget breakdowns are collected at the end of each fiscal year to provide an accurate record of expenditure levels.

The 1988-89 actual state travel office budget figures, therefore, may not agree with projected figures for individual states which were published in the previous report in this series. The purpose of successive reports is to continually provide the most updated information available.

GENERAL ADMINISTRATION

Forty-eight states and two U.S. territories responding to the survey currently have one official government agency primarily responsible for travel development and promotion. The D.C. Convention and Visitors Association is responsible for travel development in the District of Columbia.

In three states there are two agencies or entities which share responsibility for travel development. Hawaii has a state travel office (HI-STO) as a division of the Department of Business and Economic Development, which works in conjunction with the Hawaii Visitors Bureau (HI-HVB). Texas has two state agencies, the Travel and Information Division of the Department of Highways and Public Transportation (TX-HWYS), and the Tourism Division of the newly-created Department of Commerce (TX-TOUR). Alaska has the Division of Tourism which is responsible for international marketing, grants, and tourist development (DOT), and the newly created Alaska Tourism Marketing Council which conducts the domestic tourism marketing program (ATMC). "General Administration -- Table 1" outlines the functions of each of these entities.

Throughout this report, figures in parentheses represent the number of states providing information used to compute the given total or average. Generally, answers for Alaska, Hawaii and Texas have been averaged or have otherwise only been counted once. Budget allocations for the two tourism entities in these states have been combined.

The head of the state travel office is referred to as the "state travel director" throughout this report, although the actual titles might vary. Of the 37 states reporting that the position of state travel director is appointed, in 22 of these states the appointment is made by the governor. The state travel director is under the state equivalent of the civil service system in only 11 states.

Seventeen new directors have been named since publication of the previous report in this series. The average number of years that the 45 state travel directors in place as of July, 1989 have served is 4.5 years (45). Three directors have been named since July of 1989, and two positions were open. Only 13 of these 45 directors had previously been with the agency before becoming director. The average years these directors had been with the agency as of July, 1989 was 6.0 years (45).

Thirty-eight travel offices report that there is a chief assistant to the travel director. The position, however, was vacant in three of those states. Five of the assistants have changed or started since last year, and the length of service for all assistants varies from 1 month to 22 years. In 20 states the chief assistant position is under the state equivalent of the civil service system. Thirty-three states indicated that some or all of the rest of the travel office staff is also under a type of civil service system.

State travel offices vary widely in the size of their staffs, which range from 3 to 145 full-time employees for an average of 37 (50) full-time employees per office. Thirty-six state travel offices also reported part-time employees, ranging in number from 1 to 68 and averaging 16 per office.

Variation in staff size is due, in part, to the inclusion of welcome center employees and budget by many of the travel offices. The average number of welcome center employees reported (if any) is 24 full-time (32) and 17 part-time (25) employees. Excluding welcome center employees from totals, the average staff sizes are 21.5 full-time (50) and 4.5 part-time (35) employees.

In 43 states, the office responsible for travel development is part of another department or agency of the state government. In most cases, it is the commerce and/or economic development department. In seven of these states, tourism promotion is combined with a related function such as parks, recreation, and community or local affairs.

The remaining 10 travel offices are cabinet level, independent agencies or tourism commissions, usually reporting directly to the governor. The total (53) includes two government agencies in Texas, one in Hawaii and Alaska, the independent visitors bureau in Hawaii and the newly created Alaska Tourism Marketing Council.

Of the two territories and the District of Columbia, the average length of service for all directors is 3 years, with an average of 5.0 years in the office altogether. The staff for these offices ranges from 6 to 19 full-time employees, an average of 13 people per office.

ADVERTISING

In 32 states the tourism director or chief assistant manages the development of the state's advertising program. In 16 states this function is performed by a marketing, advertising or promotions officer. Eight states reported a change in the advertising agency retained since last year. Advertising agencies are, on average, in their fifth year for the 50 states.

In 48 states, advertising is at least partially directed toward stimulating inquiries. Twenty-three of these states reported that all of the advertising budget is directed toward stimulating inquiries, while the overall average amount of the budget dedicated to this purpose is 83 percent (48).

Travel offices reported a total of nearly 15 million general and advertising-generated inquiries received during 1988, or approximately 312,000 inquiries per state (48), ranging from under 100,000 to one million. The majority of states receive some or all inquiries through toll-free lines. For these states, about 37 percent (42) of all inquiries are received via toll-free lines, on average.

Twenty-one states said there is advertising in their inquiry fulfillment piece, which for eight of these states completely covers the production cost. Inquiries are surveyed to measure advertising effectiveness by 46 state travel offices. Generally states have inquiry source tracking and conduct conversion studies by telephone or by mail, either through an insert card in the fulfillment piece, or a follow-up survey.

BUDGET

The first of five budget sections (pages 37 - 39) includes budget totals for the two years reported in the survey, along with rankings for the 50 states. The next two sections give detailed breakdowns of the two budgets covered in the survey, as follows:

Budget -- 1988-89 Actual Expenditures	Pages 40 - 46
Budget -- 1989-90 Projected Budgets	Pages 47 - 53

The section "Budget -- 1989-90 Advertising" (pages 55 - 58) contains information about general promotion and foreign advertising allocations for fiscal year 1989-90. Explanatory notes for figures with asterisks (*) are in the "Budget -- Comments" tables, appearing on pages 59 - 60. Expenditure category descriptions are detailed in Appendix A.

Total Budgets

The proposed budgets for fiscal year 1989-90 total over $340 million (50), 6 percent more than the $320 million (50) actual budget allocation for fiscal year 1988-89.

State general revenues are the sole funding source for 28 travel offices. Other revenue sources for the other 22 states include lodging and other tourism-dedicated tax receipts, membership dues, lottery funds, and a few private sources.

Allocations for matching funds programs, usually used for cooperative advertising, are included in the 1989-90 budget for 33 states. For some states, matching funds are derived from separate appropriations, and are not included in the totals reported here.

As shown in Table A, the proposed budgets for fiscal year 1989-90 range from $22,518,510 in Hawaii to $1,405,000 in Delaware. The average state travel office budget for 1989-90 is estimated at $6,813,190. Eighteen states' budgets fall above this mean, accounting for 65 percent of the $340 million projected total for all 50 states.

The distribution of state travel office budgets is skewed to the high end. Hawaii at $22.5 million, and New York closely following at $22.1 million, are over three times the average. The sum of budgets for the top ten states alone represents 46 percent of the total projected allocation. The average of state travel budgets is heavily weighted by these top ten states. The remaining 40 travel office budgets fall closer together in a range between one and nine million dollars, with an average of $4,585,707.

Two U.S. territories provided breakdowns of their 1989-90 budgets. Guam reported a total of $3,888,352, a 16 percent increase over 1988-89. American Samoa estimated a 20 percent decline at $365,500.

TABLE A: 1989-90 PROJECTED STATE TRAVEL OFFICE BUDGETS BY RANK

1	Hawaii	$22,518,510	26	Louisiana	5,171,663
2	New York	22,056,000	27	Alabama	5,132,772
3	Illinois	22,036,300	28	Nevada	5,116,710
4	Texas	18,856,381	29	Kentucky	5,073,500
5	Pennsylvania	15,907,000	30	Montana	4,543,234
6	Michigan	14,100,000	31	Iowa	4,463,357
7	Alaska	11,382,600	32	Wyoming	3,908,201
8	Tennessee	10,631,000	33	Utah	3,698,799
9	Virginia	10,292,550	34	South Dakota	3,200,000
10	Florida	9,450,876	35	Oregon	3,039,500
11	South Carolina	8,650,000	36	Indiana	3,000,000
12	Wisconsin	8,499,500	37	Rhode Island	2,813,759
13	Georgia	8,250,463	38	New Mexico	2,726,000
14	Minnesota	8,071,000	39	West Virginia	2,700,455
15	New Jersey	7,985,200	40	Washington	2,693,233
16	Colorado	7,849,000	41	Idaho	2,313,960
17	Arkansas	7,700,000	42	Mississippi	2,281,000
18	Massachusetts	7,000,000	43	Kansas	2,131,591
19	Maryland	6,627,149	44	New Hampshire	2,114,816
20	California	6,500,000	45	Maine	2,082,156
21	North Carolina	6,407,469	46	Vermont	2,006,000
22	Oklahoma	6,322,956	47	Connecticut	1,986,573
23	Missouri	6,047,652	48	North Dakota	1,550,000
24	Arizona	5,558,600	49	Nebraska	1,486,319
25	Ohio	5,320,702	50	Delaware	1,405,000
				Grand Total	$340,659,506
				Average	$6,813,190

To emphasize the geographic variation in the development of tourism promotion in the U.S., the state travel office budgets are grouped by the nine U.S. Census Regions in Table B. The number of states comprising each region is shown in parentheses.

The Mid-Atlantic region continues to outdistance other regions in its average state travel office budget, as two of the three states in this region are among the top five budgets overall. The East North Central region has the second highest average budget, with two of its five states registering in the top ten tourism budgets.

Table B also presents the percentage increase of the average budget per Census Region over 1988-89 spending levels, as reported by the states in this year's survey.

TABLE B: 1989-90 STATE TRAVEL OFFICE BUDGETS BY CENSUS REGION

Census Region*	1989-90 Average Budget Per Region		Percent Change from 1988-89 Actual Budget
New England	$3,000,551	(6)	-13.4%
Mid-Atlantic	15,316,067	(3)	-4.4%
South Atlantic	6,722,995	(8)	6.3%
East South Central	5,779,568	(4)	6.9%
East North Central	10,591,300	(5)	10.5%
West South Central	9,512,750	(4)	4.2%
West North Central	3,849,988	(7)	22.8%
Mountain	4,464,313	(8)	2.4%
Pacific	9,226,769	(5)	20.4%
All States	$6,813,190	(50)	6.2%

Note: Number of states reporting is given in parentheses.

*Census Regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont.
MID-ATLANTIC: New Jersey, New York, Pennsylvania.
SOUTH ATLANTIC: Delaware, Florida, Georgia, Maryland, Virginia, North Carolina, South Carolina, West Virginia.
EAST SOUTH CENTRAL: Alabama, Kentucky, Mississippi, Tennessee.
WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas.
EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin.
WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota.
MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming.
PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Two-Year Breakdown and Comparison

Table C compares the average 1989-90 projected breakdown for each of the budget categories with 1988-89 actual spending levels.

TABLE C: SUMMARY OF AVERAGE BUDGETED EXPENDITURES BY CATEGORY

Category*	1988-89 Average Actual Budget		1989-90 Average Projected Budget		Annual Percent Change
Advertising	$2,551,310	(48)	$2,520,288	(50)	-1.2%
Personnel Services	857,543	(49)	865,388	(49)	0.9%
Administrative Costs	431,596	(44)	442,164	(46)	2.4%
Printing & Production	519,694	(47)	537,391	(47)	3.4%
Inquiry Fulfillment	382,855	(44)	429,305	(44)	12.1%
Promotion, Press & PR	396,976	(43)	466,520	(46)	17.5%
Research	111,579	(35)	128,806	(39)	15.4%
Matching Funds Program	828,847	(33)	918,848	(34)	10.9%
Welcome Center Operation	544,040	(32)	632,092	(36)	16.2%
Other	852,893	(33)	682,052	(32)	-20.0%
Total Budget	$6,413,984	(50)	$6,813,190	(50)	6.2%

Note: Number of states reporting is given in parentheses.

*Descriptions of each expenditure category are given in Appendix A.

Descriptions of each expenditure category given in Appendix A were included in this year's survey for use by state travel offices in preparing their budget breakdowns.

A total of 20 travel offices included allocations for Direct Grants in their 1989-90 budget, with an average of $601,502 (20).

The annual percentage increase or decrease from the 1988-89 actual expenditures to the 1989-90 projected total budget for each state, as reported in the current survey, is shown in Table D.

TABLE D: ANNUAL PERCENT CHANGE IN TOTAL STATE TRAVEL BUDGETS

		1988-89 Actual	1989-90 Projected	Annual Percent Change
AL	Alabama	$5,106,772	$5,132,772	1%
AK	Alaska	10,878,294	11,382,600	5%
AZ	Arizona	5,374,500	5,558,600	3%
AR	Arkansas	2,757,890	7,700,000	179%
CA	California	5,500,000	6,500,000	18%
CO	Colorado	7,705,000	7,849,000	2%
CT	Connecticut	2,166,345	1,986,573	-8%
DE	Delaware	1,382,200	1,405,000	2%
FL	Florida	10,820,718	9,450,876	-13%
GA	Georgia	8,110,463	8,250,463	2%
HA	Hawaii	17,340,119	22,518,510	30%
ID	Idaho	2,073,300	2,313,960	12%
IL	Illinois	21,825,600	22,036,300	1%
IN	Indiana	2,100,000	3,000,000	43%
IA	Iowa	3,364,406	4,463,357	33%
KS	Kansas	1,471,539	2,131,591	45%
KY	Kentucky	5,017,000	5,073,500	1%
LA	Louisiana	4,736,273	5,171,663	9%
ME	Maine	2,870,394	2,082,156	-27%
MD	Maryland	4,825,911	6,627,149	37%
MA	Massachusetts	9,400,000	7,000,000	-26%
MI	Michigan	12,000,000	14,100,000	18%
MN	Minnesota	6,777,100	8,071,000	19%
MS	Mississippi	1,151,500	2,281,000	98%
MO	Missouri	5,655,998	6,047,652	7%
MT	Montana	3,711,759	4,543,234	22%
NE	Nebraska	1,190,763	1,486,319	25%
NV	Nevada	6,250,001	5,116,710	-18%
NH	New Hampshire	1,915,207	2,114,816	10%
NJ	New Jersey	8,141,000	7,985,200	-2%
NM	New Mexico	2,500,000	2,726,000	9%
NY	New York	25,923,800	22,056,000	-15%
NC	North Carolina	6,407,469	6,407,469	0%
ND	North Dakota	1,085,000	1,550,000	43%
OH	Ohio	5,612,553	5,320,702	-5%

TABLE D: ANNUAL PERCENT CHANGE IN TOTAL STATE TRAVEL BUDGETS (Continued)

		1988-89 Actual	1989-90 Projected	Annual Percent Change
OK	Oklahoma	6,574,422	6,322,956	-4%
OR	Oregon	2,119,000	3,039,500	43%
PA	Pennsylvania	13,992,463	15,907,000	14%
RI	Rhode Island	2,501,000	2,813,759	13%
SC	South Carolina	7,647,500	8,650,000	13%
SD	South Dakota	2,400,000	3,200,000	33%
TN	Tennessee	10,359,500	10,631,000	3%
TX	Texas	22,438,624	18,856,381	-16%
UT	Utah	3,695,087	3,698,799	0%
VT	Vermont	1,941,800	2,006,000	3%
VA	Virginia	9,924,352	10,292,550	4%
WA	Washington	2,487,876	2,693,233	8%
WV	West Virginia	1,491,430	2,700,455	81%
WI	Wisconsin	6,400,000	8,499,500	33%
WY	Wyoming	3,577,247	3,908,201	9%
	Total	$320,699,175	$340,659,506	6.2%
	Average	$6,413,984	$6,813,190	

A five-year summary comparison of state travel office budgets is presented in Table E. Actual state travel office budget totals and averages for fiscal years 1985-86 through 1988-89 for the fifty states, as given in the four preceding state travel office surveys, are compared with the projected 1989-90 total budget figure.

TABLE E: FIVE-YEAR COMPARISON OF STATE TRAVEL OFFICE BUDGETS

Fiscal Year	Total Actual Budget	Average Actual Budget		Annual Percent Change
1985-86	$211,618,948	$4,232,379	(50)	11.3%
1986-87	243,634,941	4,872,699	(50)	15.1%
1987-88	290,638,421	5,812,768	(50)	19.3%
1988-89	320,699,175	6,413,984	(50)	10.3%
1989-90*	340,659,506	6,813,190	(50)	6.2%

*Projected budgets for 1989-90
Note: Number of states reporting is given in parentheses.

Advertising Budgets

The state 'advertising' budget is the sum of media purchase and production costs. Travel offices report proposed 1989-90 advertising budgets totaling $126,014,418, an average of $2,520,288 (50) per state. Advertising budgets for 1989-90 vary from a low of $150,000 to a high of $11,903,700, as shown in Table F.

The actual average of advertising expenditures for 1988-89 was $2,551,310 (48). Overall, the portion of total budgets allocated for advertising was 38 percent for 1988-89 and 37 percent for 1989-90.

The one territory reporting a 1989-90 advertising budget was Guam at $986,282, up from $683,461 during 1988-89.

TABLE F: 1989-90 PROJECTED ADVERTISING BUDGETS BY RANK

1	New York	$11,903,700	26	Georgia	1,652,000
2	Illinois	11,500,000	27	West Virginia	1,600,000
3	Alaska	5,383,000	28	Wyoming	1,594,188
4	Texas	5,368,784	29	Utah	1,486,860
5	Hawaii	4,828,387	30	Indiana	1,400,000
6	Virginia	4,729,000	31	South Dakota	1,382,697
7	Missouri	4,695,123	32	Maryland	1,351,150
8	New Jersey	4,691,400	33	Minnesota	1,338,574
9	Florida	4,362,176	34	Alabama	$1,280,300
10	Pennsylvania	4,132,000	35	Rhode Island	1,250,093
11	California	3,790,000	36	Nevada	1,120,000
12	Colorado	3,695,000	37	Ohio	1,094,989
13	Arkansas	3,450,000	38	Oregon	770,000
14	Michigan	3,250,000	39	New Hampshire	679,500
15	Tennessee	3,075,000	40	Kansas	675,000
16	North Carolina	3,001,947	41	Mississippi	650,000
17	South Carolina	2,850,000	42	North Dakota	633,000
18	Massachusetts	2,834,000	43	New Mexico	556,500
19	Wisconsin	2,725,000	44	Vermont	531,780
20	Louisiana	2,597,257	45	Connecticut	520,000
21	Arizona	2,518,900	46	Washington	513,200
22	Iowa	2,080,000	47	Nebraska	431,000
23	Oklahoma	1,822,250	48	Maine	390,000
24	Kentucky	1,700,000	49	Idaho	309,000
25	Montana	1,671,663	50	Delaware	150,000
				Grand Total	$126,014,418
				Average	$2,520,288

As with total budgets, advertising budgets are unevenly distributed over the range. Twenty states have advertising budgets greater than the average. The sum of advertising budgets for the top ten states represents 49 percent of the total funds allotted for advertising by all fifty travel offices. Travel offices in 25 states project to spend between $1 and $3.5 million, while 13 states have budgeted under one million dollars.

Average advertising budgets by Census Region are given in Table G. The Mid-Atlantic region outpaces the other regions in advertising spending, with all three states in the region ranking among the top ten states in advertising spending overall.

Five Census Regions enjoyed gains in their average advertising budgets. The West North Central region saw a 22 percent jump from 1988-89, bringing it closer to other regions at similar spending levels. The Mid Atlantic region, although showing the highest average, declined nearly 13 percent over last year's level of spending.

TABLE G: 1989-90 STATE TRAVEL ADVERTISING BUDGETS BY CENSUS REGION

Census Region*	1989-90 Average Budget Per Region	Percent Change from 1988-89 Actual Budget
New England	$1,034,229 (6)	-3.7%
Mid-Atlantic	6,909,033 (3)	-12.5%
South Atlantic	2,462,034 (8)	5.6%
East South Central	1,676,325 (4)	14.2%
East North Central	3,993,998 (5)	-0.9%
West South Central	3,309,573 (4)	-1.1%
West North Central	1,605,056 (7)	22.3%
Mountain	1,619,014 (8)	9.7%
Pacific	3,056,917 (5)	15.1%
All States	$2,520,288 (50)	2.9%

Note: Number of states reporting is given in parentheses.

*See page 6 for states comprising each Census Region.

The annual percentage increase or decrease from the 1988-89 actual expenditures to the 1989-90 projected advertising budget for each state, as reported in the current survey, is shown in Table H.

TABLE H: ANNUAL PERCENT CHANGE IN STATE TRAVEL ADVERTISING BUDGETS

		1988-89 Actual	1989-90 Projected	Annual Percent Change
1	Alabama	1,153,271	1,280,300	11%
2	Alaska	5,240,226	5,383,000	3%
3	Arizona	2,733,500	2,518,900	-8%
4	Arkansas	483,298	3,450,000	614%
5	California	3,080,000	3,790,000	23%
6	Colorado	3,420,459	3,695,000	8%
7	Connecticut	794,409	520,000	-35%
8	Delaware	125,000	150,000	20%
9	Florida	4,894,500	4,362,176	-11%
10	Georgia	1,864,268	1,652,000	-11%
11	Hawaii	4,000,000	4,828,387	21%
12	Idaho		309,000	
13	Illinois	11,500,000	11,500,000	0%
14	Indiana	850,000	1,400,000	65%
15	Iowa	1,336,500	2,080,000	56%
16	Kansas	366,274	675,000	84%
17	Kentucky	1,670,000	1,700,000	2%
18	Louisiana	1,400,000	2,597,257	86%
19	Maine	894,520	390,000	-56%
20	Maryland	471,471	1,351,150	187%
21	Massachusetts	2,500,000	2,834,000	13%
22	Michigan	3,430,497	3,250,000	-5%
23	Minnesota	1,504,191	1,338,574	-11%
24	Mississippi		650,000	
25	Missouri	4,345,770	4,695,123	8%
26	Montana	1,370,491	1,671,663	22%
27	Nebraska	294,000	431,000	47%
28	Nevada	964,479	1,120,000	16%
29	New Hampshire	700,000	679,500	-3%
30	New Jersey	5,270,633	4,691,400	-11%
31	New Mexico	453,000	556,500	23%
32	New York	15,223,500	11,903,700	-22%
33	North Carolina	3,001,947	3,001,947	0%
34	North Dakota	404,000	633,000	57%
35	Ohio	1,603,480	1,094,989	-32%

TABLE H: ANNUAL PERCENT CHANGE IN STATE TRAVEL ADVERTISING BUDGETS (Continued)

		1988-89 Actual	1989-90 Projected	Annual Percent Change
36	Oklahoma	2,383,105	1,822,250	-24%
37	Oregon	600,000	770,000	28%
38	Pennsylvania	3,186,162	4,132,000	30%
39	Rhode Island	1,020,000	1,250,093	23%
40	South Carolina	2,770,000	2,850,000	3%
41	South Dakota	933,300	1,382,697	48%
42	Tennessee	3,050,000	3,075,000	1%
43	Texas	9,117,437	5,368,784	-41%
44	Utah	1,500,919	1,486,860	-1%
45	Vermont	533,870	531,780	0%
46	Virginia	4,819,840	4,729,000	-2%
47	Washington	362,747	513,200	41%
48	West Virginia	700,000	1,600,000	129%
49	Wisconsin	2,776,500	2,725,000	-2%
50	Wyoming	1,365,306	1,594,188	17%
	TOTAL	122,462,870	126,014,418	2.9%
	AVERAGE	2,551,310	2,520,288	-1.2%

States were requested in the survey to categorize their media purchase budget according to the advertising media to be used. Thirty-nine states provided a complete media purchase breakdown by six categories, with the average amount budgeted per medium detailed in Table I.

One territory, Guam, reported a media purchase budget for 1989-90 of $877,512. The majority of these funds are designated for magazine advertising.

Twenty-one travel offices included solicitation of conventions in their 1989-90 general promotion budget. On average, states dedicated $84,986 (44) for participation in about 14 travel shows (48) for 1989-90, including domestic, international, consumer and trade shows.

Thirty-four states were able to estimate their foreign promotion and media purchase allocation for the upcoming year. As shown in the tables, "Budget -- 1989-90 Advertising", these budgets ranged from $7,000 to $1,638,013, with an average of $255,161 per state (34). A few states noted the Canadian market is included in domestic totals.

TABLE I: ANNUAL PERCENT CHANGE IN MEDIA PURCHASE BUDGETS, BY MEDIUM

Medium	1988-89 Average Actual Budget		1989-90 Average Projected Budget		Annual Percent Change
Magazine	$482,585	(41)	$606,500	(38)	25.7%
Newspaper	254,853	(32)	241,611	(28)	-5.2%
Television	1,024,078	(34)	950,773	(35)	-7.2%
Radio	374,793	(15)	245,819	(21)	-34.4%
Outdoor	89,602	(13)	88,550	(13)	-1.2%
Other	162,471	(14)	165,920	(17)	2.1%

Note: Number of states reporting is given in parentheses.

A five-year summary comparison of advertising budgets is presented in Table J. Actual averages for fiscal years 1985-86 through 1988-89 provided by the states, compiled from the five preceding surveys, are compared with the projected 1989-90 aggregate advertising figure.

TABLE J: FIVE-YEAR COMPARISON OF ADVERTISING BUDGETS

Fiscal Year	Average Actual Budget		Annual Percent Change
1985-86	$1,699,408	(49)	11.5%
1986-87	2,199,413	(48)	29.4%
1987-88	2,256,379	(50)	2.6%
1988-89	2,551,310	(48)	13.1%
1989-90*	2,520,288	(50)	-1.2%

*Projected advertising budgets for 1989-90
Number of states reporting is given in parentheses

GENERAL PROMOTION

Special travel promotion themes or slogans for 49 states are given in "General Promotion -- Table 1". Some states employ more than one slogan in different advertising media. Forty-six states conduct annual state travel conferences in the months of September through May.

Ten states operate out-of-state information centers, primarily members of the New England Vacation Center in New York. Moreover, 28 states operate tourist information centers in foreign countries, mainly in Japan, Canada, England, Belgium and West Germany.

Forty-four states and one territory provide one or more toll-free telephone numbers for travel information inquiries. Six of these states listed separate numbers to accommodate in-state and out-of-state callers. Some lines are seasonal and/or dedicated for providing specific information, such as weather conditions or events.

PACKAGE TOURS

Forty-one travel offices indicated that they facilitate the development of package tours. Of these, 34 distribute package tour literature. Seventeen states published and distributed a catalog of state tour packages in 1988; 27 travel offices said they plan to do so in 1989. Some states noted that they provide group tour planning assistance.

Nearly one-half of states conduct familiarization tours relative to those given in their package tour catalog. Twenty-eight states noted that the travel office budget includes funds for development and/or promotion of package tours. There is a staff member assigned to tour package development in 35 state travel offices.

PRESS AND PUBLIC RELATIONS

Forty-nine state travel offices, the District of Columbia, and one territory named their public relations or press information officer. As shown in "Press and Public Relations -- Table 1", the state travel director performs this function in three states. Forty-four states also publish a travel-related newsletter, usually monthly or quarterly.

A total of 39 states indicated that half or more of their publicity is directed to an out-of-state audience. The average of the 46 states reporting the number of state tours given for press or travel writers in 1988 was 9 tours. The average number of press or travel writers taken on state tours in 1988 was 49 people.

RESEARCH

The tables in the Research section describe many of the research projects undertaken by the state travel offices. One or more staff members are currently dedicated to travel research in 44 offices. This is a full time responsibility for only 13 of these staff members. In eight states, research is included among the tourism director's duties.

Most states conduct detailed research studies in addition to their ongoing data gathering projects. Studies may be conducted solely or jointly by the travel office or another state agency; by advertising agencies, research firms, and/or university research centers.

As outlined in "Research -- Table 1", states reported conducting the following types of studies during 1988-89, where one study could cover more than one of these objectives:

Type of Study Conducted in 1988-89	Number of States
Advertising Effectiveness/Conversion study	34
Economic Impact	31
State Visitor Profile	21
Consumer Attitude/Awareness/Image studies	20

In addition to these types of studies, 24 states specified other research projects, described under additional comments in "Research-- Table 2". Ongoing travel data gathering projects for 43 states are detailed in this table as well. These programs involve counts and surveys of welcome center visitors; motor vehicle counts; collection of data on travel-related business receipts; and visitation at state facilities and private attractions.

State travel offices were asked to identify major problems facing tourism development in their respective states. Though a few states gave a positive outlook, the majority of states shared common concerns, mostly economic. Frequently mentioned limitations include:

- o budgetary or other funding constraints
- o economic conditions
- o lack of or difficulty in obtaining capital (high interest rates)
- o lack of adequate infrastructure or resources (e.g. staffing)
- o lack of awareness as to the importance of tourism
- o competition
- o transportation concerns (e.g. distance and cost)

States pointed out the need for improved public image; increased awareness of the impact of travel in a state; tourism marketing and development strategies; and incentives for investment.

WELCOME CENTERS

These tables cover a variety of state welcome centers, some of which receive travel office funding. Included are highway welcome centers, usually constructed by the state transportation department and operated by the travel office; highway rest areas which may also provide tourist services; and visitor or information centers which usually promote a city or region within the state.

There are approximately 504 state welcome centers in 47 states, most of which are permanent facilities and operated year round. On the average, there are 11 welcome centers being operated in each of these 47 states, while the number ranges from one center each in Alaska, Arizona, Idaho, and Nevada to 92 centers reported by New York. The District of Columbia operates one permanent visitor information center.

Each of the centers employs an average of about 7 people (44), including both full-time and/or part-time staff members. Welcome center staff are seasonal or volunteers in a few states.

A total of 38 state travel offices reported that they provide funding for state welcome centers; 32 of these states supply funding to all the centers. Most of the travel offices which provide welcome center funding cover 100 percent of centers' operating costs. States specified what the travel office funds are allocated for, according to the following categories:

Funds Allocated For	States	Percent
Staffing	38	100%
Staff Training	36	95
Internal Furnishing	28	74
Travel Literature/Brochures	29	76
Internal Maintenance/Upkeep	27	71
Property Maintenance/Upkeep	18	47
Renovation/Major Repair	13	34
Construction	9	24

Travel offices also reported other sources of funding for welcome centers in the state. The predominant source was the highway or transportation department, which provided such funding in 37 states. In 28 of these states welcome center responsibility was shared with the travel office, while in 9 of them the travel office provided no funds.

Most states collect statistics on visitor volumes at state welcome centers, as given in "Welcome Centers -- Table 2". The methods vary, and include logs of visitors requesting information or otherwise interacting with staff members; guest signature books; vehicle counters combined with travel party size estimates; and on-site surveys.

Additional comments also include descriptions of welcome centers which are planned or under construction, and other types of centers which do not receive travel office funding.

State	State Agency Responsible for Travel Development	Breakdown and Size of Travel Office Staff	Full-time	Part-time	State Travel Director	Length of Service as of July 1989 As Director In Agency	Position Appointed? Appointed by Whom?	Under Civil Service?
AL	Alabama Bureau of Tourism & Travel 532 S. Perry St. Montgomery, AL 36104-4614 205/261-4169	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	11 14 42 67	1 1	Lisa Walsh Shivers Director	2 years 5 months 2 years 5 months	Yes Governor	No*
AK DOT	Alaska Division of Tourism P.O. Box F Juneau, AK 99811 907/465-2012	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	8 7 1 16	 3 3	Dana Breckovey Director	1 month 1 month	Yes Governor	No
AK ATMC	Alaska Tourism Marketing Council 3601 C Street, Suite 700 Anchorage, AK 99503	Prof./Mgmt. Cler./Sec. TOTAL	2 1 3		Bob Miller Executive Director	7 months 7 months	Yes ATMC Board	No
AZ	Arizona Office of Tourism 1100 W. Washington Phoenix, AZ 85007 602/542-3618	Prof./Mgmt. Cler./Sec. Intern/student TOTAL	9 6 1 16		Vic Heller Director	2 year 6 months 2 year 6 months	Yes Governor	No
AR	Arkansas Department of Parks & Tourism One Capitol Mall Little Rock, AR 72201 501/371-1087	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	17 6 38 61	 1 1 2	Joe Rice Director	2 years 1 month 8 years	No	No
CA	Office of Tourism 1121 L Street - Suite 103 Sacramento, CA 95814 916/322-1396	Prof./Mgmt. Cler./Sec. TOTAL	2 1 3		Florence Snyder Director	6 years 2 months 6 years 2 months	Yes Governor	No
CO	Colorado Tourism Board 1625 Broadway Denver, CO 80202 303/592-5410	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	12 2 4 18		Rich Meredith Executive Director	5 months 5 years 5 months	No	Yes
CT	Connecticut Department of Economic Development Tourism Division 865 Brook Street Rocky Hill, CT 06067 203/258-4286	Prof./Mgmt. Cler./Sec. Welcome Center Intern/student TOTAL	7 3 2 3 15	2 24* 26	Barnett Laschever Director	15 years 15 years	No	Yes
DE	Delaware Tourism Office 99 Kings Highway P.O. Box 1401 Dover, DE 19903 302/736-4254	Prof./Mgmt. Cler./Sec. TOTAL	3 1 4		Catherine Wheeler Director of Tourism	5 years 5 years 4 months	No	No
DC	Washington Convention & Visitors Association 1212 New York Avenue, NW Washington,D.C. 20005 202/789-7000	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	2 3 1 6		Marie Levin Tibor Director of Tourism	5 years 7 years		No
FL	Florida Div. of Tourism Collins Building Tallahassee, FL 32301 904/488-5607	Prof./Mgmt. Cler./Sec. Welcome Center Sales Intern/student Other TOTAL	16 22 42 21 4 105	2 4 2 8	Ed Litrenta Director	1 year 8 months 1 year 8 months	Yes Secretary of Commerce	No
GA	Georgia Department of Industry & Trade Tourist Division 230 Peachtree St. NW Suite 605 Atlanta, GA 30303 404/656-3590	Prof./Mgmt. Cler./Sec. Welcome Center Intern/student TOTAL	25 5 91 121	 30 6 36	Hanna Ledford Deputy Commissioner for Tourism	6 years 21 years	Yes Department	Yes

See "General Administration — Table 2" for explanatory notes

State	State Agency Responsible for Travel Development	Breakdown and Size of Travel Office Staff	Full-time	Part-time	State Travel Director	Length of Service as of July 1989	Position Appointed?	Under Civil Service?
HI STO	Hawaii Tourism Office Grosvenor Center 737 Bishop Street Mauka Tower #1900 Honolulu, HI 96813 808/548-7700	Prof./Mgmt. Cler./Sec. Intern/student TOTAL	6 2 8	 2 2	Muriel Anderson Manager	5 years 4 months 5 years 4 months	No	Yes
HI HVB	Hawaii Visitors Bureau 2270 Kalakaua Avenue Suite 801 Honolulu, HI 96815 808/923-1811	Prof./Mgmt. Cler./Sec. Sales Welcome Center Intern/student TOTAL	35 31 4 4 13 87		Stanley Hong President	5 years 5 years	Yes HVB Board of Directors	No
ID	Division of Travel Promotion Department of Commerce Statehouse, Room 108 Boise, ID 83720	Prof./Mgmt. Cler./Sec. Intern/student Admin./Accounting TOTAL	4 3 1 2 10		Carl Wilgus Director	2 years 3 months 2 years 3 months	Yes Department of Commerce Director	No
IL	Illinois Office of Tourism State of Illinois Center 100 W. Randolph #3-400 Chicago, IL 60601 312/814-4732	Prof./Mgmt. Cler./Sec. Welcome Center Intern/student TOTAL	13 7 12 32	 14 2 16	Lynda Simon Deputy Director	8 years 5 months 8 years 5 months	Yes Governor	No
IN	Tourism Development Div. Indiana Commerce Center One North Capitol #700 Indianapolis, IN 46204 317/232-8860	Prof./Mgmt. Cler./Sec. Welcome Center Intern/student TOTAL	6 3 9 1 19		Denise Miller Director	9 months 9 months	Yes Lieutenant Governor	No
IA	Bureau of Tourism & Visitors Iowa Department of Economic Development 200 East Grand Des Moines, IA 50309 515/281-3100	Prof./Mgmt. Cler./Sec. Admin. Welcome Center Intern/student TOTAL	6 1 1 8	 1 15 1 17	David Reynolds Bureau Chief	1 year 2 months 1 year 2 months	No 	No
KS	Kansas Department of Travel & Tourism 400 W. 8th, Suite 500 Topeka, KS 66603 913/296-2009	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	6 5 10 21	 1 12 13	Robert Salmon Director	10 months 10 months	Yes Governor	No
KY	Department of Travel Development Capital Plaza Tower 22nd Floor Frankfort, KY 40601 502/564-4930	Prof./Mgmt. Cler./Sec. Welcome Center Sales Interns/student TOTAL	23 15 20 6 1 65	 4 4	Mimi Lewis Commissioner	3 years 6 months 14 years	Yes Governor	No
LA	Louisiana Office of Tourism P. O. Box 94291 Baton Rouge, LA 70804-9291 504/925-3850	Prof./Mgmt. Cler./Sec. Welcome Center Sales Other TOTAL	12 5 30 4 4 55	 8 56 4 68	Bob LeBlanc Assistant Secretary	13 years 13 years	Yes Lieutenant Governor	No
ME	Department of Economic & Community Development Office of Tourism 189 State Street Augusta, ME 04333 207/289-5710	Prof./Mgmt. Cler./Sec. TOTAL	8 1 9		Hilary Sinclair Deputy Commissioner for Tourism	6 months 2 years	Yes Governor or Commissioner	No
MD	Maryland Office of Tourism Development 45 Calvert St. Annapolis, MD 21401 301/974-2686	Prof./Mgmt. Cler./Sec. TOTAL	11 4 15		Elizabeth Comer Acting Director	New	No	Yes

See "General Administration — Table 2" for explanatory notes

State	State Agency Responsible for Travel Development	Breakdown and Size of Travel Office Staff	Full-time	Part-time	State Travel Director	Length of Service as of July 1989	Position Appointed? Appointed by Whom?	Under Civil Service?
MA	Department of Commerce & Development Executive Office of Economic Affairs Office of Travel & Tourism 100 Cambridge Street Boston, MA 02202 617/727-3201	Prof./Mgmt. Cler./Sec. Welcome Center Intern/student TOTAL	14 5 3 22	 4 4	Deborah First Acting Director	New	Yes Governor	No
MI	Michigan Travel Bureau Department of Commerce P.O. Box 30226 Lansing, MI 48909 517/373-0670	Prof./Mgmt. Cler./Sec. Welcome Center Intern/student TOTAL	20 7 4 31	 3 6 9	John Savich Director	5 years 4 months 5 years 4 months	No Governor	Yes
MN	Department of Trade & Economic Development Office of Tourism 375 Jackson — 250 Skyway St. Paul, MN 55101 612/296-2755	Prof./Mgmt. Cler./Sec. Welcome Center Intern/student TOTAL	32 13 19 64	1 9 31 41	Henry Todd Director	11 years 16 years	Yes Governor	No
MS	Department of Economic Development Tourism Division P. O. Box 849 Jackson, MS 39205 601/359-3297	Prof./Mgmt. Cler./Sec. Welcome Center Film Promotion TOTAL	6 4 37 3 50	 	John Horne Associate Director	7 months 7 months	Yes Agency Director & Governor	No
MO	Missouri Div. of Tourism Truman Building P.O. Box 1055 Jefferson City, MO 65102 314/751-4133	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	10 5 21 36	 	Marjorie Beenders Director	6 years 6 months 6 years 6 months	No	No
MT	Montana Promotion Division Department of Commerce Helena, MT 59620-0411 406/444-2654	Prof./Mgmt. Cler./Sec. TOTAL	11 5 16	 	Sandra Guedes Travel Director	New (11/1/89) 4 years	No	Yes
NE	Division of Travel & Tourism Department of Economic Devt. 301 Centennial Mall South P. O. Box 94666 Lincoln, NE 68509 402/471-3800	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	4 5 1 10	 36 36	Peggy Briggs Director	5 years 6 years 4 months	No	Yes
NV	Commission on Tourism Capital Complex Carson City, NV 89710 702/687-4322	Prof./Mgmt. Cler./Sec. TOTAL	13 12 25	 4 4	Bob Barker Executive Director	New (11/89)	Yes Governor	No*
NH	Office of Vacation Travel 105 Loudon Road P.O. Box 856 Concord, NH 03301 603/271-2665	Prof./Mgmt. Cler./Sec. Other Interns/students TOTAL	3 2 1 6	 1 2 3	Christopher A. Jennings Travel Director	New (9/89) New (9/89)	No	Yes
NJ	Division of Travel & Tourism Twenty West State St. CN-826 Trenton, NJ 09625 609/292-2470	Prof./Mgmt. Cler./Sec. Interns/student Other TOTAL	9 7 2 18	 12 1 13	Noreen Bodman Director	2 years 5 months 2 years 5 months	Yes Governor	No
NM	Economic Development & Tourism Department 1100 St. Francis Dr. Santa Fe, NM 87503 505/827-0295	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	5 5 11 21	 1 9 10	Buz Bainbridge Director	New (11/89)	Yes Governor	No

See "General Administration — Table 2" for explanatory notes

GENERAL ADMINISTRATION — TABLE 1

State	State Agency Responsible for Travel Development	Breakdown and Size of Travel Office Staff	Full-time	Part-time	State Travel Director	Length of Service as of July 1989 As Director	Length of Service as of July 1989 In Agency	Position Appointed? Appointed by Whom?	Under Civil Service?
NY	Division of Tourism Dept. of Economic Develop. One Commerce Plaza Albany, NY 12245 518/473-0715	Prof./Mgmt. Sales Cler./Sec. Other TOTAL	13 10 15 2 40		Michele Vennard Deputy Commissioner of Tourism	2 years	2 years	Yes Commissioner (DED)	No
NC	Div. of Travel & Tourism Department of Commerce 430 N. Salisbury St. Raleigh, NC 27611 919/733-4171	Prof./Mgmt. Cler./Sec. Welcome Center Intern/student TOTAL	10 10 40 60	 3 5 1 9	Richard D. Trammell Director	2 months	2 months	Yes Governor	No
ND	North Dakota Tourism Promotion Liberty Memorial Bldg. 600 East Boulevard Bismarck, ND 58505 701/224-2525	Prof./Mgmt. Cler./Sec. Welcome Center Other TOTAL	4 3 2 9	 16 16	Jim Puglie Tourism Director	4 years 6 months	4 years 6 months	Yes Director, Econ. Dev. Comm.	No
OH	Division of Travel & Tourism Ohio Department of Development P. O. Box 1001 Columbus, OH 43266-0101 614/466-8844	Prof./Mgmt. Cler./Sec. Welcome Center Sales Intern/student Other TOTAL	6 3 1 2 5 17	 8 8	Marilyn Tomasi Director	6 years 3 months	6 years 3 months	Yes Governor	No
OK	Oklahoma Tourism & Recreation Dept. Div. of Mktg. Services 505 Will Rogers Bldg. Oklahoma City, OK 73105 405/521-2406	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	18 15 33 66	1 7 20 28	Cathleen Marks Director	New (1/90)		Yes Executive Director	No
OR	Tourism Division Economic Development Dept. 595 Cottage St., NE Salem, OR 97310 503/373-1270	Prof./Mgmt. Cler./Sec. Welcome Center Intern/student TOTAL	5 4 1 10	1 1 * 2	Debby Kennedy Director	2 years	2 years	Yes Governor**	No
PA	Travel Marketing Bureau Department of Commerce Forum Bldg. Harrisburg, PA 17120 717/787-5453	Prof./Mgmt. Cler./Sec. Intern/student TOTAL	4 3 7	 2 2	Mark Hoy Director	3 months	3 months	Yes Secretary of Commerce	No
RI	Department of Economic Development 7 Jackson Walkway Providence, RI 02903 401/277-2601	Prof./Mgmt. Cler./Sec. Welcome Center Intern/student TOTAL	7 1 5 13	 2 3 5	David DePetrillo Director	6 years 6 months	16 years 3 months	Yes Director of Economic Development	No
SC	Department of Parks, Recreation & Tourism Division of Tourism 1205 Pendelton St., #113 Columbia, SC 29201 803/734-0135	Prof./Mgmt. Cler./Sec. Welcome Center TOTAL	18 9 45 72	 10 10	Robert Liming Director	10 years 6 months	10 years 6 months	No	No*
SD	South Dakota Department of Tourism Capitol Lake Plaza 711 Wells Ave. Pierre, SD 57501 605/773-3301	Prof./Mgmt. Cler./Sec. Sales Welcome Center Intern/student TOTAL	11 3 4 18	2 5 37 5 49	Susan Edwards Secretary of Tourism	8 years 6 months	8 years 6 months	Yes Governor	No
TN	Tennessee Department of Tourist Development 320 Sixth Avenue North Fifth Floor Nashville, TN 37219 615/741-2159	Prof./Mgmt. Cler./Sec. Welcome Center Sales TOTAL	13 16 113 3 145	 	Sandra Fulton Commissioner	2 years 8 months	2 years 8 months	Yes Governor	No

See "General Administration -- Table 2" for explanatory notes

State	State Agency Responsible for Travel Development	Responsible Area and Size of Travel Office Staff	Full-time	Part-time	State Travel Director	Length of Service as of July 1989 As Director	In Agency	Position Appointed? Appointed by Whom?	Under Civil Service?
TX (HWY)	Department of Highways & Public Transportation Travel & Information Div 11th & Brazos Streets Austin, TX 78701 512/463-8563	Prof. Mgmt Cler. Sec. Welcome Center TX HWYS Magazine* 1-800 Travel Comm. TOTAL	14 6 47 23 2 92	 12 12	J. Don Clark Director	3 years 12 years 1 month		Yes Engineer-Director Hwy. Dept.	No
TX (TDT)	Tourism Division TX Department of Commerce Box 12008 Capitol Station Austin, TX 78711 512/462-9191	Prof. Mgmt Cler. Sec. TOTAL	14 13 27	 	William Taylor Deputy Director-Tourism	11 months 11 months		No	No
UT	Division of Travel Development Council Hall/Capital Hill Salt Lake City, UT 84114 801/538-1030	Prof. Mgmt Other Sales TOTAL	10 6 1 17	 	Jay Woolley Director	4 years 4 months 4 years 4 months		Yes Governor	Yes
VT	Agency of Development & Community Affairs Vermont Travel Division 134 State Street Montpelier, VT 05602 802/828-3236	Prof. Mgmt Cler. Sec. Welcome Center Intern/student TOTAL	6 7 9 21	 1 8 1 9	Donald Lynne Director	27 years 6 months 27 years 6 months		No	Yes
VA	Virginia Division of Tourism 1021 E. Cary Street 14th Floor Richmond, VA 23219 804/786-2051	Prof. Mgmt Cler. Sec. Welcome Center Salem Other TOTAL	14 8 40 6 6 74	* 6 13 22	Patrick McMahon Director of Tourism	4 years 1 month 4 years 1 month		Yes Director, Econ. Devel	No
WA	Trade & Economic Development Tourism Development Division 101 General Admin. - AX-13 Olympia, WA 98504-0613 206/753-5600	Prof. Mgmt Cler. Sec. Intern/student TOTAL	10 6 16	 2 2	Ken Gouldthorpe Director	New (11/89) New (11/89)		Yes Department Director	No
WV	Department of Commerce Marketing/Tourism Division 2101 Washington Street East Charleston, WV 25305 304/348-2286	Prof. Mgmt Clerical Welcome Centers Sales Telemarketing TOTAL	3 3 16 2 12 36	 1 10 20* 31	John H. Brown, Jr. Commissioner	1 month 1 month		Yes Governor	No
WI	Division of Tourism Development 123 W. Washington Avenue Madison, WI 53702 608/266-2147	Prof. Mgmt Cler. Sec. Welcome Center TOTAL	10 2 14 26	2 2 30 34	Richard Metty Administrator	2 years 3 months 2 years 3 months		Yes Governor	No
WY	Wyoming Travel Commission Frank Norris Jr. Travel Center Cheyenne, WY 82002 307/777-7777	Prof. Mgmt Cler. Sec. Welcome Center Other TOTAL	8 7 1 2 18	 1 1 2 	Gene Bryan Director	1 year 5 months 6 years 5 months		Yes Board of Commissioners	No
AS	Office of Tourism American Samoa Government P.O. Box 1147 Pago Pago, AS 96799 684/699-9280 or 9259	Prof. Mgmt Cler. Sec. Intern/student Other TOTAL	5 4 4 13	 	Emma P. Randall Director	7 months 9 months		Yes Governor	No
GU	Guam Visitors Bureau P.O. Box 3520 1220 Pale San Vitores Rd. Tamuning, GU 96911 671/646-5278 or 5279 Telex: (671) 6432	Prof. Mgmt Cler. Sec. TOTAL	15 4 19	 	Joey Cepeda General Manager	2 years 2 months 6 years		Yes GVB Board of Directors	No

(See "General Administration — Table 2" for explanatory notes)

GENERAL ADMINISTRATION — TABLE 2

State	Chief Assistant to Travel Director	Period of Service as Assistant	Assistant Under Civil Service?	Rest of Staff Under Civil Service?	Name of Department or Agency of Which State Travel Office is a Part	Additional Comments
AL	Michael Mitchell Assistant Director	2 years 5 months	No	Yes	None*	Director is a Cabinet-level position. *The Bureau of Tourism & Travel is an independent state agency. It is not under any other state agency.
AK DOT	Brenda Knapp Deputy Director	1 year 6 months	No	Yes	Department of Commerce & Economic Development	Legislation was passed in the 1986 session creating the Alaska Tourism Marketing Council with primary responsibility for conducting domestic marketing programs for Alaska. Director of Tourism chairs the Council.
AK ATMC	James Wright Marketing Coordinator	7 months	No	Yes	Department of Commerce & Economic Development	See comments above.
AZ	Michael Leyva Deputy Director	5 years 3 months	No	No		
AR	Judy Shrugs Assistant Tourism Director	1 year 4 months	No	No	Department of Parks and Tourism	The Tourism Division is one of four distinct divisions. Parks & Tourism is under a 13 member commission. History, Great River Road & Museum Services each have separate commissions. Each division has a director, and the director of Parks and Tourism is a member of the Governor's Cabinet.
CA	Diane Dreier Deputy Director	6 years	No	Yes	Department of Commerce	
CO	None			Yes	Department of Local Affairs	The Deputy Director position has been phased out.
CT	Vacant		Yes	Yes	Department of Economic Development	*Part-time welcome center staff are seasonal.
DE	Gigi D. Hindley Director of Tourism Marketing	4 years 3 months	No	No	Development Office	Interns/students augment staff when available and appropriate.
DC	Thomas Murphy Tourism Promotion Mgr. (Acting Assistant)	5 years	No	No		
FL	None*			Some	Department of Commerce	*Position deleted.
GA	Harvey Monk Assistant Director	5 years	Yes	Yes	Department of Industry & Trade	The Dept. of Industry & Trade includes divisions that promote economic development through tourism, file location, industrial development and international trade.
HI STO	Greg Bartram Tourism Specialist	5 years	Yes	Some	Department of Business & Economic Development	The primary responsibilities of Hawaii's Tourism Office are: 1) Administration of State contract with the Hawaii Visitors Bureau for marketing Hawaii as a visitor destination, and 2) coordinating the planning processes for general tourism development and long-term marketing strategy. The STO is developing a Tourism Impact Management System, and is funding miscellaneous studies addressing various threats and opportunities which Hawaii's visitor industry may encounter. The STO directly funds a variety of marketing and promotional activities as well, many of which are intended to enhance industry and community relations.

State	Chief Assistant to Travel Director	Period of Service as Assistant	Assistant Under Civil Service?	Rest of Staff Under Civil Service?	Name of Department or Agency of Which State Travel Office is a Part	Additional Comments
HI HVB	Eugene T. Cotter Senior Vice President Marketing and Administration	7 years 7 months	No	No	Department of Business & Economic Development	The Hawaii Visitors Bureau is a private, nonprofit corporation under contract to the State of Hawaii. HVB is responsible for coordinating all state tourism advertising, disseminating promotional literature, and conducting research about visitors to Hawaii.
ID	None			Yes	Department of Commerce	
IL	Susan Jacobs Assistant Deputy Director	6 years 7 months	Yes	Yes	Department of Commerce & Community Affairs	
IN	Carolyn Allaman Deputy Director	8 months	No	No	Department of Commerce	
IA	None			Clerical staff only	Department of Economic Development	The Tourism Bureau is one section in the state's Economic Development Agency. A board of 11 directors, appointed by the governor, sets policy for the whole agency and has final approval over any programs the agency proposes to undertake.
KS	Mary Lou McPhail Assistant Director	6 months	Yes	Yes	Department of Commerce	
KY	Max Lacy Deputy Commissioner	1 year 1 month	No	Yes*	Tourism Cabinet	*Except for 6 non-merit employees, all employees in the department are covered by state merit system which is equivalent to civil service.
LA	Bob Dudden Deputy Assistant Secretary	15 years	Yes	Yes	Department of Culture Recreation & Tourism Office of Lt. Governor	
ME	Nathaniel Braditch Assistant Deputy Commissioner	6 months	No	Mixed*	Department of Economic and Community Development	*Professional staff are appointed; support staff are classified state employees.
MD	Elizabeth Comer Assistant Director	1 year 7 months	Yes	Yes	Department of Economic & Employment Development	
MA	Debbie Firet Deputy Director	4 years 11 months	No	Mixed	Executive Office of Economic Affairs	
MI	Sandra Clark Deputy Director	9 months	Yes	Yes	Department of Commerce	
MN	Bonnie Richter Deputy Director	1 year 6 months	Yes	Yes	Department of Trade & Economic Development	
MS	None			No	Department of Economic Development	The Mississippi Division of Tourism is undergoing transition under a new executive director for the Department of Economic Development.
MO	None*					*Assistant Director's position was abolished by the Commission due to budget limitations.
MT	None		No	No	Department of Commerce	
NE	None			No	Department of Economic Development	
NV	Vacant		No	Mixed*	Commission on Tourism	*Professional positions unclassified, clerical positions classified.
NH	Andrea Tindal Assistant Director	New (10/89)	Yes	Yes	Division of Economic Development	

State	Chief Assistant to Travel Director	Period of Service as Assistant	Assistant Under Civil Service?	Rest of Staff Under Civil Service?	Name of Department or Agency of Which State Travel Office is a Part	Additional Comments
NJ	John Dent Assistant Director	2 years 5 months	No	Mixed*	Department of Commerce, Energy and Economic Development	*There are both appointed and civil service staff positions. The Tourism Division is a sub-cabinet level.
NM	Liz Dee Georges Administrative Secretary	1 year 3 months	Yes	Yes	Economic Development & Tourism Department	
NY	Joseph Schilling Director, Regional Marketing	8 years	Yes	Yes	Department of Economic Development	
NC	None			No	Department of Economic & Community Development	
ND	Tracy Potter Assistant Director	1 month	Yes	Yes	Economic Development Commission	
OH	Gene Mathews Assistant Director	9 years 3 months	No	Yes*	Department of Development	*Only clerical & support staff
OK	Jane Huff Assistant Director	1 year 4 months	No	Yes	Tourism & Recreation Department	The department is organized into 5 divisions: Mktg. Services, Lodges, State Parks, Planning & Development, and Administrative Services, each having a director. The Executive Director of the department is the cabinet level position (Secretary of Natural Resources). The total number of authorized employees is 849.
OR	Julie Curtis Assistant Director	1 year 6 months	Yes	Yes	Economic Development Department	*Welcome center employees contracted out. **Director appointed by the Governor in conjunction with Tourism Council and the director of the economic development department.
PA	None				Department of Commerce	
RI	Becky Bowlsby Deputy Director	2 years 9 months	No	Mixed*	Department of Economic Development	*All department employees with exception of clerical are unclassified civil service.
SC	Peggy Smith Assistant Director	5 years	No*	No*	Department of Parks, Recreation & Tourism	*State employees are under a state classification code. They do have job protection to the extent that after a 6-month probation period, dismissal must be with cause. Certain procedures have to be followed, and an employee who has been dismissed can appeal.
SD	None			Yes	Department of Tourism	
TN	Sandra Duncan Assistant Commissioner Pam H. Inman Assistant Commissioner	2 years 4 months 2 years 3 months	No No	Majority	The Department of Tourist Development is a cabinet-level department.	The state travel director is a Commissioner. The Assistant Commissioners reporting to her are non-civil service and manage the activities of the department. Management reporting to the Assistant Commissioners are the Director of Welcome Centers, Director of Administrative Services, Director of Information and Director of Sales.

State	Chief Assistant to Travel Director	Period of Service as Assistant	Assistant Under Civil Service?	Rest of Staff Under Civil Service?	Name of Department or Agency of Which State Travel Office is a Part	Additional Comments
TX HWYS	Milton Mehurg Director of Travel Services Section	1 year 11 months	No	No	Department of Highways & Public Transportation	The Texas travel and tourism program is a collateral one which is shared by two state agencies. The Travel and Information Division of the Department of Highways and Public Transportation (TX-HWYS) is responsible for operating the state's highway tourist bureaus; production and distribution of the state's family of printed travel literature; production of highway travel information exhibits (Info-boards) located in 105 highway rest areas; production and distribution of travel-oriented audio visuals and compilation and publication of the state's annual survey of auto visitors. *TEXAS HIGHWAYS Magazine is the official travel mag. of the state.
TX TOUR*	Phil Davis Assistant Director	22 years 4 months	No	No	Department of Commerce	Major responsibilities of the Tourism Division (TX-Tour) include marketing, advertising, inquiry fulfillment, research, public relations, travel tours and trade show promotion programs.
UT	Ann King Assistant Director Industry Development	7 years 6 months	Yes	Yes	Department of Community & Economic Development	
VT	J. Gregory Gerdel Chief of Information and Education	8 years 6 months	Yes	Yes	Agency of Development & Community Affairs	
VA	Maryaret Lewelak Assistant Commissioner	4 years 8 months	Yes	Yes	Department of Economic Development	Governor's Travel Advisory Committee is responsible for advising governor and agency head.
WA	Barbara Brenner Assistant Tourism Director	5 years	Yes	Yes	Department of Trade & Economic Development	Administrative Assistant to both Tourism Director and Asst. Tourism Director has served 5 years. Asst. Tourism Director served as Acting Director for 14 months.
WV	Vacant*		Yes	Yes	Department of Commerce Labor and Environmental Resources	*Telemarketing staff are seasonal.
WI	Gary Knowles Director, Bureau of Communications Winfield Macdonald Director, Bureau of Marketing	12 years 5 years	Yes Yes	Yes	Department of Development	Welcome Center part-time staff are not permanent employees.
WY	Clyde Douglass Assistant Director	12 years	No	No	None*	*We are a separate agency within the executive branch. We have a 7 member public Board of Commissioners appointed by the Governor.
AS		1 month		Yes	Office of Tourism	
GU	Michael D. Carlson Assistant Director	4 months	No	Yes	None	

State	Individual Responsible for Development of Travel Advertising Program	Current Advertising Agency	Years Retained	Does State Have Matching Fund Program for Cooperating Groups?	Included in Budget Rather Than Separate Appropriation?	What is the Matching Formula?
AL	Tyler Turner Contracted Ad Agent	Barney & Patrick Advertising, Inc. 306 St. Francis St. P.O. Box 69 Mobile, AL 36601	3 years	Yes	Yes	Figures vary depending on the project. We assist in financing production costs for tourism-related brochures, etc.
AK ATMC	Bob Miller Executive Director	Bradley Advertising 1440 S. Bragaw, Suite 200 Anchorage, AK 99508	1 year 7 months	*		
AZ	Stephen Prahm Director of Advertising & Community Promotion	Taylor Advertising 2828 North Central Ave. Phoenix, AZ 85004	2 years	Yes	Yes	Communities with population 0-30,000: 4 to 1; 30,000 - 250,000: 2 to 1; 250,000+: 1 to 1.
AR	Joe Rice Director	The Woods Bros. Agency 1001 W. Markham Little Rock, AR 72201	12 years	Yes	No	2/1
CA	Kristy Flynn Director - Marketing & Communications Department of Commerce	Keye/Donna/ Pearlstein 11080 Olympic Road Los Angeles, CA 90064	5 years	No		
CO	Mario Giordano Director of Advertising	Karsh and Hagan 5500 Greenwood Plaza Blvd # 200 Denver, CO 80111	2 years	Yes	Yes	Varies, but most are 50-50% matching.
CT	Anthony Davenport Director of Communications	LSGE 60 Avon Meadow Avon, CT 06001	3 years 6 months	No		Formula varies by project.
DE	Vacant	Lynns, Inc. 715 Orange Street Wilmington, DE 19801	8 years	Yes	Yes	Up to 50%.
DC	*			No		
FL	Ed Litrenta Director	McFarland & Drier, 99 S.E. 5th Street Miami, Florida 33131	2 years	No		Negotiable: cooperative programs have been developed with travel industry companies, not with local destinations within state.
GA	Gary Wrenck Advertising Director	Pringle, Dixon, & Pringle 245 Peachtree Ctr, #1500 Atlanta, GA 30303	6 years	Yes		50-50% match
HI HVB	Eugene Cotter Sr. Vice President of Marketing & Administration	Milici, Valenti, Gabriel Park Advertising, Inc. 700 Bishop St., 12th Fl. Honolulu, HI 96813	18 years	No		
ID	Carl Wilgus Director	Elgin, Syferd/Drake Communications 350 N. 9th Street Boise, ID 83707	7 years	Yes	Yes	50-50% match
IL	Lynda Simon Deputy Director	McConnaughy, Barocci & Brown	New (8/89)	Yes	No	Depends on program and entity participating in cooperative program.
IN	Denise Miller Director	Juhl Advertising 3930 Edison Lakes Pkwy. Mishawaka, IN 46545	New (7/89)	Yes	No	50/50 match applies only to non-profit organizations advertising outside their county or the state.
IA	Managing Director	Kragie/Newell Advertising 2633 Fleur Drive Des Moines, IA 50321	2 years	Yes	Yes	

See "Advertising — Table 2" for comments and explanatory notes

State	Individual Responsible for Development of Travel Advertising Program	Current Advertising Agency	Years Retained	Does State Have Matching Fund Program for Cooperating Groups?	Included in Budget Rather Than Separate Appropriation?	What is the Matching Formula?
KS	Robert Salmon Director	Lane Marketing Group, Inc. 345 Riverview, Suite 410 P.O. Box 578 Wichita, KS 67201	1 year	No		
KY	Linda Talbott Director, Marketing and Advertising	Doe-Anderson Advertising 223 East Broadway Louisville, KY 40202	1 year	Yes	Yes	80/20 for regional media advertising; 50/50 for local media advertising.
LA	Bruce Morgan Advertising and Publicity Director	Sides & Associates 404 Rosete Landry Road P.O. Box 51954 Lafayette, LA 70506	6 years	Yes	Yes	None
ME	Hilary Sinclair Deputy Commissioner	Lendy Swindlick Markey 1 Canal Plaza Portland, ME	5 years	Yes	Yes	Varies
MD	Executive Director	Earle Palmer Brown Cos. 6935 Arlington Road Bethesda, MD 20814	1 year	Yes	Yes	50-50% match
MA	Director	Hill, Holiday 200 Clarendon Street Boston, MA 02116	5 years	Yes	No	50-50% match
MI	Melinda Remer Director, Communications Div.	Ross Roy, Inc. 2751 E. Jefferson Detriot, MI 48207	30 years	Yes	No	50-50% match
MN	Bonnie Richter Deputy Director	Carmichael-Lynch Advertising, Inc. 800 Hennepin Avenue Minneapolis, MN 55403	4 years	No		
MS	Lisa Ratzlaff Associate Director Communications & Advertising	No agency currently retained; done in-house		Yes	Yes	50-50% match
MO	Marjorie Beenders Director	Glennon & Co. One City Center St. Louis, MO 63101	New	No		
MT	Sandra Guedes Travel Director	Wexit Advertising P. O. Box 2128 Great Falls, MT 59403	7 years	No		
NE	Peggy Briggs Director	Bailey Lewis & Assoc. 924 NBC Center Lincoln, NE 68508	5 years	No		
NV	Bob Barker Acting Executive Director	R & R Advertising 615 Riverside Dr. Reno, NV 89503	2 years	Yes	Yes	50-50% for counties over 17,000 (1980 Census)
NH	Christopher A. Jennings Travel Director	O'Neil Griffen Body 324 Commercial Street Manchester, NH 03101	7 years	No*		50-50% match
NJ	Noreen Bodman Director	Poppy Tyson 201 Littleton Road Morris Plains, NJ 07950	7 years	Yes	Yes	50-50% match
NM	Buz Bainbridge Director	Competitive Edge P.O. Box 3500 Albuquerque, NM 87190	1 year	Yes	Yes	50-50% or 1 to 1 match
NY	Stephen Morello Deputy Commissioner	Wells, Rich & Green 767 5th Ave. New York, NY 10022	13 years	Yes	Yes	50-50% match

See "Advertising — Table 2" for comments and explanatory notes

ADVERTISING — TABLE 1

State	Individual Responsible for Development of Travel Advertising Program	Current Advertising Agency	Years Retained	Does State Have Matching Fund Program for Cooperating Groups?	Included in Budget Rather Than Separate Appropriation?	What is the Matching Formula?
NC	Dick Trammell Director	McKinney & Silver 333 Fayetteville St. Raleigh, NC 27601	13 years	Yes	No	Formula varies based on county economic ranking.
ND	Jim Puglie Tourism Director	G. L. News Agency P.O. Box 350 Fargo, ND 58107 Bismark, ND 58502	2 years	Yes	Yes	Most projects are eligible for a 50-50% match. Some projects are matched 66% state - 33% private.
OH	Tim Kauffman Marketing Manager General Market Tim Moore Manager, Public Relation Communication Minority Market	(General Market) Hameroff/Milenthal/Spence One Columbus 10 West Broad St. Columbus, OH 43215 (Minority Market) Forest Grove Advertising 571 Congress Park Drive Centerville, OH 45459	6 years 4 months 2 months	Yes*	Yes	50% state - 50% partner
OK	Cathleen Marks Director Dennis Donaldson Advertising/Promotions Manager	Runkle-Monroe 6801 N. Broadway Ext. Oklahoma City, OK 73116	1 year 8 months	Yes	Yes	50-50% match
OR	Denny Kennedy Director	Wieden & Kennedy 320 SW Washington Portland, OR 97204	2 years	No	Yes	Our matching funds program is a tourism - development grant program, not a cooperative ad program.
PA	Mark Hoy Director	Elkman Advertising 150 Monument Road Bala Cynwyd, PA 19004	2 years	Yes	No	Single county: Up to $2 for each $1 of local promotional activity. Regional: Up to $2.25 for each $1 of local promotional activity.
RI	David DePetrillo Director	Duffy & Shanley 4 Cathedral Square Providence, RI 02903	6 years	Yes	Yes	50-50% match with participating regional tourism councils on certain projects
SC	Marion Edmonds Manager, Advertising Services	Leslie Advertising Agency P.O. Box 6168 Greenville, SC 29607	10 years	Yes	Yes earmarked admission tax revenues	50-50%
SD	Patricia Van Gerpen Director of Creativity	Lawrence and Schiller Advertising, Inc. 3932 South Willow Sioux Falls, SD 57105	10 years	Yes	Yes	84% state - 16% private
TN	Sandra D. Duncan Assistant Commissioner Travel Promotion	Walker & Associates, Inc. 1100 Morgan Keegan Tower 50 N. Front Street Memphis, TN 38103	2 years	Yes	Yes	25% state - 75% industry for consumer print advertising; 50-50% up to $2,500 for tour operator advertising.
TX TOUR	William Taylor Deputy Director - Tourism	GSD & M One Circle Center 1250 Capital of Texas Hwy Austin, TX 78746	1 year 6 months	No		
UT	Jay Woolley Director	Harris & Love, Inc. 1800 University Club Bldg. 136 E. So. Temple Salt Lake City, UT 84111 Evans/Salt Lake 375 W. 200 South, #200 Salt Lake City, UT 84101	15 years New	Yes	Yes	$15,000 each, 50-50% match for 9 regions
VT	Donald Lyons Director	Knox, Nimick & Harwood Stowe, VT 05672	2 years	Yes	Yes	50-50%, with 25% of state share retained for "umbrella" advertising.

See "Advertising — Table 2" for comments and explanatory notes

ADVERTISING — TABLE 1

State	Individual Responsible for Development of Travel Advertising Program	Current Advertising Agency	Years Retained	Does State Have Matching Fund Program for Cooperating Groups?	Included in Budget Rather Than Separate Appropriation?	What is the Matching Formula?
VA	Jule Bolio Director of Advertising	The Martin Agency, Inc. 550 Allen Avenue Richmond, VA 23230	2 years	No		
WA	Ken Gouldthorpe Tourism Director	Cole & Weber 308 Occidental Ave. South Seattle, WA 98104	4 years	Yes	Yes	Some projects funded 100%; others require 50% match. Available to nine non-profit designated tourism regions only, for range of marketing activities. Not available to individual businesses.
WV	Stephen Scott Advertising Director	Fahlgren & Swink, Inc. Rosemar Road Parkersburg, WV 26101	New	No		To be determined per project.
WI	Winfield MacDonald Director, Bureau of Marketing	Frankenberry, Laughlin & Constable 207 E. Michigan Avenue Milwaukee, WI 53202	4 years	Yes*		Up to 50% depending on requests.
WY	Gene Bryan Director	Broyles, Allebaugh & Davis, Inc. 31 Denver Tech Center Englewood, CO 80111	3 years	Yes	Yes	50-50% match not to exceed $40,000 per application
AS	Emma F. Randall Director	None		No*		*None - 100% locally funded
(E)	Pilar Laguna Marketing Manager Vivian Perez Marketing Officer North America/Europe Cathy Gogue, Marketing Officer Asia/Pacific Setsuko Cullen Marketing Officer, Japan	Meitsu BJK & E 1-1-3, Nishi-shinbashi Minato-ku Tokyo 105 Japan	5 years	Yes		Generally 50-50% match.

See "Advertising — Table 2" for comments and explanatory notes

ADVERTISING — TABLE 2

State	Is Advertising Directed Toward Stimulating Inquiries? (Percent)	—Inquiries in 1988— Total Received	% From 800 Number	Advertising in Inquiry Fulfillment Brochure? % Paid by State	If Done, How Are Inquiries Surveyed to Measure Advertising Effectiveness? Additional Comments
AL	Yes -- 95%	256,000	N/A	Yes 100%	Conversion surveys are conducted by a contracted research firm.
AK ATMC	Yes -- 50%	603,312	None	Yes*	A conversion study is done annually. *The private sector of the Alaskan Visitor Industry raises money which is combined with state funds in a cooperative marketing program.
AZ	Yes -- 50%	207,450	None	No 100%	Arizona Office of Tourism advertising is "image" advertising. We are currently developing cooperative advertising.
AR	Yes -- 100%	361,000	25%	Yes 75%	An in-house survey of 10,000 households who had previously requested a vacation planning kit is conducted each year.
CA	Yes -- 100%	500,000	28%	Yes 100%	Telephone surveys are conducted by a professional agency to test marketing effectiveness. Results indicate level of interest, recall and vacation/business plans involving California.
CO	Yes -- 100%	408,431	39%	No 5%	In-house analyses are done on each ad and media placements to determine cost-per-inquiry and total inquiry generation by creative execution, size of ad, timing of ad, multiple insertions and type of medium.
CT	Yes -- 100%	150,000	90%	No 100%	A sample recall survey is conducted.
DE	Yes -- 100%	60,900	48%	No 100%	
DC					*All tourism advertising for Washington, D.C. is handled by city government (D.C. Committee to Promote Washington) and the Hotel Association of Washington, D.C.
FL	No -- 90%*	**	None	Yes None	The primary goal of our advertising is to broaden the appeal of Florida. *This figure is split about evenly between trying to stimulate inquiries from consumers and trying to stimulate inquiries from the travel trade. **Our annual demand for the distribution of the vacation guide is about 500,000 requests, which are generated several ways.
GA	Yes -- 42%	295,000	20%	Yes*	The effectiveness of the advertising campaign is measured by a private company using a telephone survey. Inquiry telephone numbers are provided by this office. *The official state fulfillment piece, GEORGIA ON MY MIND, is produced by a private firm using paid advertising to cover production costs. This department buys ad space in the book which has exceeded 100 pages in each of the last two years. The percentage the department pays of the total cost has not been determined.
HI HVB	Yes -- 100%	N/A	None	Yes 100%	Conversion studies are conducted. Names are pulled from the data based and contacted to find out whether or not they traveled to Hawaii in the time period indicated on their questionnaire.
ID	Yes -- 100%	155,000	25%	Yes 100%	Five percent of inquiries sampled (3/4 by mail, 1/4 by phone) to gather specific information regarding visitation, travel and spending patterns.
IL	Yes -- 100%	200,000	50%	No	Inquiries are surveyed to measure advertising effectiveness.
IN	Yes -- 100%	143,000	80%	No 100%	A conversion study of a sample of toll-line respondents is conducted. In 1989, additional research has been conducted through advanced telemarketing system.
IA	Yes -- 75%	163,102	46%	No 100%	A follow-up questionnaire is completed to determine the percent that traveled to Iowa, length of stay, spending, etc. Information from the survey is used to determine the return on investment.
KS	Yes -- unk.	47,709	25%	No	Not surveyed at present.
KY	Yes -- 100%	204,500	41%	Yes 100%	Telephone and mail response to ads are measured. A follow-up survey of a random sample of those who requested information is conducted at the end of a calendar year. The information collected is used to evaluate advertising effectiveness.

ADVERTISING — TABLE 2

State	Is Advertising Directed Toward Stimulating Inquiries? (Percent)	—Inquiries in 1988— Total Received	% From 800 Number	Advertising in Inquiry Fulfillment Brochure? % Paid by State	If Done, How Are Inquiries Surveyed to Measure Advertising Effectiveness? Additional Comments
LA	Yes — 100%	182,000	19%	No 100%	A conversion study is conducted of inquiries from the spring advertising campaign. A study of the spring 1988 campaign will be conducted in late 1988.
ME	Yes — 90%	1,138,000	4%	Yes None	Conversion surveys are conducted.
MD	Yes — 100%	250,000	60%	100%	We code each ad for mail-in responses. We ask each caller on our toll-free line where they got the number.
MA	Yes — 100%	650,000	50%	None	Periodic pre- and post-awareness and conversion studies are conducted. Fulfillment piece supported by advertisment and produced by independent publisher.
MI	Yes — 100%	446,305	51%	None	Inquiries generated by market, media and interest. Media cost per inquiry. Recently completed inquiry conversion study.
MN	Yes — 77%	954,236	40%	No 100%	Every print ad is coded with a media code or coupon and a unique phone number so inquiries can be tracked by insertion. Every TV station purchased in our ADI has a unique telephone number and responses are tracked on a daily basis. Direct mail is done three times each year by season.
MS	Yes — 65%	72,100*	N/A	Yes 100%	*Figure includes mail and telephone inquiries. Conducting conversion study through outside consulting firm.
MO	Yes — 25%	100,600	None	No 80%	We have a research firm poll the markets before we enter them after we enter both in the spring and fall of each year, and we also do a follow-up questionnaire.
MT	Yes — 40%	360,000	10%	Yes 80%	Periodic conversion studies are conducted.
NE	Yes — 50%	82,667	10%	No N/A	Every three years we do a conversion study and try to maintain a minimum conversion rate of 40%. Cost per inquiry rates are calculated annually.
NV	Yes — 100%	360,000	13%	Yes 100%*	Conversion study and reader service card follow up in fulfillment piece. *Advertising in the fulfillment piece is a state revenue item.
NH	Yes — 90%	100,000	28%	No 100%	Conversion studies and focus groups are conducted. *No cooperative advertising program other than through matching grants program.
NJ	Yes — 85%	200,000	85%	Yes N/A	Lead fulfillment service provides a breakdown of statistics from requests generated by advertising. After each spring advertising campaign, a tracking study is conducted to ascertain awareness of state's attributes.
NM	Yes — 100%	121,687	40%	Yes 100%	Track advertising through toll-free lines by coded responses.
NY	Yes — 100%	893,887	63%	No 100%	Inquiries are surveyed to determine adequacy of collateral content and distribution time. Ad effectiveness monitored via household surveys in major media markets: Advertising and Destination Awareness/Travel Activity and Intentions. Advertising is also used to create and enhance destination awareness and appeal.
NC	Yes — 70%*	465,000	30%	No 100%	We prepare a monthly report that tracks what state and what magazine the inquiries come from. We also conduct detailed conversion studies. *We have an "awareness program" in national magazines. Since it does stimulate some inquiries, part of that advertising is included.
ND	Yes — 75%	125,000	40%	Yes 98%	Inquiries not surveyed.
OH	Yes — 90%	498,248	100%	Yes** 15-20%	All callers are asked: How did you hear of our service? T.V., radio, newspaper, regular caller, billboard, back of phone book, magazine or other. *State's 100% matching grants program is geared towards cooperative marketing and advertising programs. **100% of printing paid by advertising revenues; 70% of production paid by state through contractor.
OK	Yes — 60%	188,566	15%	Yes* None	A conversion study is conducted wherein a representative sample of those requesting information are surveyed by an independent research firm. *The fulfillment piece is published by the Oklahoma Travel Industry Association and provided free to the department for distribution.

State	Is Advertising Directed Toward Stimulating Inquiries? (Percent)	—Inquiries in 1988— Total Received	—Inquiries in 1988— % From 800 Number	Advertising in Inquiry Fulfillment Brochure? % Paid by State	If Done, How Are Inquiries Surveyed to Measure Advertising Effectiveness? Additional Comments
DP	Yes — 95%	175,680	20%	100%*	*We are investigating selling a limited number of full-page color ads in our state travel guide to generated revenue to offset printing costs of the guide. Ad conversion studies done on all major campaigns.
PA	Yes — 100%	247,000	55%	No 100%	All inquiries are tracked by source. Conversion studies are conducted following major advertising campaigns.
RI	Yes — 100%	180,000	20%	No 100%	CPI study conducted by agency; conversion study conducted by outside research firm.
SC	Yes — 100%	560,000	10%	No 100%	Computerized data provides measurements. Conversion studies are also done periodically.
SD	Yes — 50%	216,571	28%	Yes 70%	All ads are coded to measure response. A telemarketing study is used to get feedback from inquirers to measure both the advertising and the fulfillment pieces' effectiveness.
TN	Yes — 100%	375,340	19%	No 100%	An inquiry conversion study with ROI analysis is conducted annually. Inquiry counts are done for each broadcast market, publication, free listing, and other identifiable sources. A cost per inquiry analysis is conducted.
TX/ H&MS	N/A	N/A	N/A	No 100%	In the state's collateral program, the Travel and Information Division (TID) is responsible for the publication of the state's fulfillment piece. For example, Tourism Division (Dept. of Commerce) places ads in magazines or newspapers, the response to these ads is sent to TID. TID then responds with the state's fulfillment piece. The Tourism Division pays for the advertising while TID pays for the production and distribution of the literature. There is no advertising in this fulfillment piece.
TX TOUR	Yes — 75%	316,634	16.5%	No 100%	We conduct an annual mail and telephone conversion study. The 800-number was not in service until February 1988.
UT	Yes — 90%	196,589	None	No 100%	We conduct a conversion study following the season to determine how many days they stayed, how many were in their party, etc.
VT	Yes — 85%	115,400	56%	No 100%	Alternate year conversion studies are conducted.
VA	Yes — 50%	368,226	42%	Yes None	To track inquiries by source, all coupons returned from print media are coded and designated 800 numbers are used. Inquiry costs are determined and compared to actual conversion/inquiry costs.
WA	Yes — *	291,564	35%	Yes None**	*43-70% depending on definition. **State has option of purchasing additional "advertorial" in fulfillment piece to supplement minimum guaranteed editorial. This participation is still estimated at less than 1% of total cost. Producer of the guide shares conversion research conducted by outside research firm. Also, each inquiry is tracked by media buy to compare number of inquiries produced by each and cost per inquiry for each.
WV	Yes — 100%	300,000	70%	No 100%	Mail-in responses are coded operator inquiries.
WI	Yes — 90%	399,534	68%	No 100%	Conversion studies are conducted annually. *Cooperative advertising program ended January 1989, to be replaced with a new joint ventures program.
WY	Yes — 100%	246,662	10%	No 100%	Periodic conversion studies are conducted.
AS	Yes — 4%	6,661	None	Yes 100%	The total number of inquiries received over a period of years (ex. 1987-1988) and the origin of these inquiries are compared to see whether or not inquiries resulted from our advertising and our participation in trade shows.
GU	Yes — 25%	25,000	20%	No 100%	Inquiries are surveyed via consumer response reports supplied by publication, and in-house inquiry response log. *Matching formula considered on a case-by-case basis. Normally, funding does not exceed $5,000 per project.

State	Date Fiscal Year Begins	Actual Budget for Fiscal Year 1988-89	Rank	Projected Budget for Fiscal Year 1989-90	Rank	Is Entire Travel Office Budget Funded by State Gen. Revenue?	IF NO: Other Sources of Funding for Travel Office	Percent	State Sales Tax Rates Applicable to Commercial Lodging
AL	October 1	$5,106,772	25	$5,132,772	27	No	Lodging tax	70%	4% state specific tax on lodging
AK DOT	July 1	3,276,557	7	3,200,000	7	Yes			no state lodging sales tax
AK ATMC	July 1	7,661,737	7	8,182,000	7	No	Co-op from industry	15%	no state lodging sales tax
AZ	July 1	5,374,500	24	5,558,600	24	No	Lodging tax receipts	36%	.5% state specific tax on lodging
AR	July 1	2,757,890	34	7,700,000	17	No	Lodging and admission tax	2%	4% state general sales tax 2% state specific tax on lodging
CA	July 1	6,500,000	23	6,500,000	20	Yes			no state lodging sales tax
CO	July 1	7,705,000	14	7,849,000	16	No	Tourism promotion tax	100%	3% state general sales tax 0.2% state specific tax on lodging
CT	July 1	2,156,345	39	1,988,573	47	Yes			8% state general sales tax
DE	July 1	1,382,200	47	1,405,000	50	Yes			8% state specific tax on lodging
FL	July 1	10,820,716	8	9,450,876	10	Yes			5% state general sales tax
GA	July 1	8,110,463	13	8,250,463	13				
HI VCB	July 1	3,656,800	4	5,830,309	1	Yes			4% state general sales tax 5% state specific tax on lodging
HI HVB	July 1	13,661,259	4	15,688,201	1	No	Membership/ misc. income	8.5%	4% state general sales tax 5% state specific tax on lodging
ID	July 1	2,073,900	42	2,313,950	41	No	Hotel/Motel & private campground tax	95%	5% state general sales tax 2% state specific tax on lodging
IL	July 1	21,825,600	3	22,036,300	3	No	Hotel/Motel tax	100%	
IN	July 1	2,100,000	41	3,000,000	36	Yes			5% state general sales tax
IA	July 1	3,364,606	32	4,463,357	31	No	State lottery funds	16%	4% state general sales tax
KS	July 1	1,471,539*	46	2,131,591*	43	No	Lottery funds Fee funds	15% 18%	4% state general sales tax (local option up to 2%)
KY	July 1	5,017,000	26	5,073,500	29	Yes			5% state general sales tax
LA	July 1	4,736,273	28	5,171,663	26	Yes			4% state general sales tax
ME	July 1	2,870,394	33	2,082,156	45	Yes			5% state general sales tax 7% state specific tax on lodging
MD	July 1	4,825,911	27	6,627,149	19	Yes			5% state general sales tax

See "Budget — Comments" section for explanatory notes

BUDGET — INTRODUCTION

State	Date Fiscal Year Begins	Actual Budget for Fiscal Year 1988-89	Rank	Projected Budget for Fiscal Year 1989-90	Rank	Is Entire Travel Office Budget Funded by State Gen. Revenue?	IF NO: Other Sources of Funding for Travel Office	Percent	State Sales Tax Rates Applicable to Commercial Lodging
MA	July 1	9,400,000	11	7,000,000	18	Yes			5% state general sales tax 5.7% state specific tax on lodging
MI	October 1	12,000,000	6	14,100,000	6	Yes			4% state general sales tax
MN	July 1	6,777,100	16	8,071,000	14	No	Trunk highway funds	8%	0.6% state general sales tax
MS	July 1	1,151,500	49	2,281,000	42	Yes			6% state general sales tax 1-2% state specific tax on lodging
MO	July 1	5,655,998	21	6,047,652	23	No	Co-op from industry	20%	no state lodging sales tax
MT	July 1	3,711,759	29	4,543,234	30	No	State lodging tax	100%	4% state specific tax on lodging
NE	July 1	1,190,763	48	1,486,319	49	No	Lodging tax	95%	4% state general sales tax 1% state specific tax on lodging
NV	July 1	6,250,001	20	5,116,710	28	No	Lodging tax Advertising sales Subscription sales Misc. revenue	78% 9% 10% 3%	6 5/8% local tax on lodging 3/8 of 1% state tax on lodging
NH	July 1	1,915,207	44	2,114,816	44	Yes			7% state specific tax on lodging
NJ	July 1	8,141,000	12	7,985,200	15	Yes			6% state general sales tax
NM	July 1	2,500,000	35	2,726,000	38	Yes			4.75% state general sales tax
NY	April 1	25,923,800	1	22,056,000*	2	Yes			4% state general sales tax
NC	July 1	6,407,469	18	6,407,469	21	Yes			5% state general sales tax
ND	July 1	1,085,000	50	1,550,000	48	No	Highway funds Misc. revenue	60% 6%	6.5% state general sales tax
OH	July 1	5,612,553	22	5,320,702	25	Yes			5-7% state general sales tax 4% state specific tax on lodging
OK	July 1	6,574,422	17	6,322,956	22	No	Tourism tax*	32%	4% state general sales tax
OR	July 1	2,119,000	40	3,039,500	35	No	Lottery	54%	no state lodging sales tax
PA	July 1	13,992,463	5	15,907,000	5	Yes			6% state general sales tax
RI	July 1	2,501,000	35 odging	2,813,759	37	No	Room tax RI Port Authority	20% 4%	6% state general sales tax 5% state specific tax on
SC	July 1	7,647,500	15	8,650,000	11	No	Earmarked admission tax	50%	5% state general sales tax 2% state specific tax on lodging
SD	July 1	2,400,000	38	3,200,000	34	Yes			No state lodging sales tax
TN	July 1	10,359,500	9	10,631,000	8	Yes			5.5% state general sales tax

See "Budget — Comments" section for explanatory notes

State	Date Fiscal Year Begins	Actual Budget for Fiscal Year 1988-89	Rank	Projected Budget for Fiscal Year 1989-90	Rank	Is Entire Travel Office Budget Funded by State Gen. Revenue?	IF NO Other Sources of Funding for Travel Office	Percent	State Sales Tax Rates Applicable to Commercial Lodging
TX HWYS	September 1	9,859,522	2	10,591,380	4	No	See "Budget — Comments"		6% state general sales tax 0.5% state specific tax on lodging*
TX TOUR	September 1	12,579,102	2	8,265,001	4	No	Hotel Occupancy tax	100%	6% state specific tax on lodging
UT	July 1	3,695,087	30	3,698,799	33	Yes			4.25% state gen. sales tax 3% state specific tax on lodging
VT	July 1	1,941,800	43	2,006,000	46	Yes			4% state general sales tax 6% state specific tax on lodging
VA	July 1	9,924,352	10	10,292,550	9	Yes			4.5% state general sales tax
WA	July 1	2,687,876	37	2,693,233	40	No	Gasoline tax	10%	6.5% state general sales tax
WV	July 1	1,491,430	45	2,700,455	39	Yes			6% state general sales tax local option tax on lodging
WI	July 1	6,400,000	19	8,499,500	12	Yes			5% state general sales tax
WY	July 1	3,577,247	31	3,908,201	32	No	Highway fund	1.6%	3% state general sales tax
AS	October 1	464,500		365,500		Yes			2% state general sales tax
GU	October 1	3,339,539		3,888,352		No	In-kind contributions Membership dues	20% 1.5%	13% state specific tax on lodging

See "Budget — Comments" section for explanatory notes

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase (Advertising Rank)	Advertising: Production	Printing and Production	Inquiry Fulfillment	Promotion, Press & PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
AL	1,139,369	947,132	983,271 (30)	170,000	150,000	100,000	85,000	63,000	106,000	710,000	Direct Grants: 670,000	Magazine: 293,722 Newspaper: 95,534 Radio: 6,252 TV: 575,403 Outdoor: 12,360 (None)
AK DOT	716,670	679,800	(5)		51,000			294,345	185,100	140,000	Direct Grants: 300,000 Film office: 75,000 Foreign Marketing: 933,342	
AK ATMC	112,130	362,900	4,714,785	525,641 (5)	764,612	675,000	358,247	180,000			Canada: 78,832	Magazine: 847,766 Newspaper: 183,494 TV: 2,888,650 Other: 794,875 (None)
AZ	471,100	658,300	2,868,300	365,300 (18)	698,700	150,000	100,000	75,000	486,000			Magazine: 699,447 Radio: 83,750 TV: 1,295,150 Outdoor: 249,840 Other: 40,000 (None)
AR	445,259	113,082	481,298 (41)		230,591	303,800	37,300	15,115	332,763	697,446		Magazine: 121,458 Newspaper: 141,555 Other: 30,285 (None)
CA	800,000	600,000	2,600,000	680,000 (13)	70,000	740,000	610,000					Magazine: 680,000 Newspaper: 720,000 TV: 1,300,000
CO	517,976	238,324	2,997,464	422,995 (11)	423,500	1,110,000	598,000	185,000	107,541	272,300	Welc. Ctr. Constr.: 70,000 Other: 562,000	Magazine: 2,331,181 Newspaper: 428,815 TV: 201,614 Outdoor: 35,854 (3%)

** See "Budget — Comments" section for explanatory notes**

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase (Advertising Rank)	Advertising: Production	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
CT	426,839	82,248	623,000 (36)	171,409	450,000	193,670	146,179	34,000		39,000		Magazine: 158,000 Newspaper: 25,000 TV: 440,000 (None)
DE	231,800		125,000 (48)		210,000			75,000	245,000		Direct Grants: 147,100 Other: 348,800	Magazine: 125,000 (15%)
FL	3,109,296	1,194,887	6,398,776 (6)	497,725	126,975	168,800	877,783	148,000		75,500	Other: 25,977	Magazine: 1,083,859 Newspaper: 149,761 TV: 3,133,744 Outdoor: 29,412 (None)
GA	985,222	521,927	1,505,368 (21)	359,000	186,000		300,000	Incl. in Advertising		2,869,030	Other: 1,484,016	Magazine: 800,000 Newspaper: 50,000 TV: 655,268
HI (FY)	803,675	178,568	(9)				2,946,617*	230,000				
HI (FY)	3,225,730	2,514,440	3,560,000 (9)	450,000		500,000	2,809,724*	611,375				
IL	1,099,900	567,100	11,500,000 (2)		674,800	***	1,256,400		1,281,000	***	Direct/ Special Grants: 5,460,400	
IN	800,000	300,000	750,000 (35)	100,000	170,000	300,000		80,000	300,000			Magazine: 100,000 TV: 650,000 (30%)
IA	416,688	93,270	1,130,680 (29)	305,830	240,000	154,418	288,900	25,000		700,000*	State Aid: 110,230	Magazine: 97,270 Newspaper: 355,000 TV: 678,410 (20%)
KS	560,974	191,561	166,274 (45)	300,000	160,276	188,672		15,000		48,580		Magazine: 36,952 Radio: 20,000 TV: 10,000 Outdoor: 9,650 Other: 89,672 (82%)

** See "Budget — Comments" section for explanatory notes**

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase (Advertising Rank)	Advertising: Production	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
KY	1,018,000	300,000	1,370,000 (22)	300,000	529,000	180,000	230,000	45,000	630,000	415,000		Magazine: 454,000 Newspaper: 144,000 Radio: 120,000 TV: 652,000 (40%)
LA	1,372,344		1,800,000 (36)		984,879	35,950	1,117,765	40,587		984,748		Magazine: 1,400,000 (None)
ME	341,397	259,073	757,297 (34)	137,223	156,000	121,000	155,044	43,627	92,500	254,000	Direct Grants: 160,000 Labor Recruitment: 10,000 Marketing: 281,233	Magazine: 397,061 Newspaper: 210,236 TV: 150,000 (None)
MD	695,268	488,040	356,189 (42)	213,282	930,954	323,259	182,536	26,227	398,500	614,054	Direct Grants: 605,592	Magazine: 20,565 Newspaper: 75,448 TV: 12,150 Other: 150,026
MA	751,000	142,000	2,800,000 (19)	300,000	70,000	890,000	800,000	150,000	2,800,000	21,000	Direct Grants: 650,000 Other: 1,624,000	
MI	1,436,567	948,821	3,300,713 (10)	229,784	1,046,125	913,710	492,037	18,353	1,960,000		Direct Grants: 2,133,900	Magazine: 512,803 Newspaper: 456,270 TV: 2,232,640 (21%)
MN	1,377,446	745,835	1,008,400 (24)	495,791	523,273	568,800	105,210	127,745	560,000	865,000	Agency Fee: 409,100	Magazine: 149,677 Newspaper: 214,664 Radio: 112,000 TV: 452,000 Other: 80,059 (30-35%)
MS	703,000	74,000							50,000	274,500	Miss Hospitality: 30,000 Parkway Promotion: 30,000	

See "Budget — Comments" section for explanatory notes

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase	Advertising: Production (Advertising Rank)	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
ND	645,763	230,683	2,945,000	1,400,770 (8)	367,000	76,000	35,000			65,782		Magazine: 10,000 Newspaper: 110,000 Radio: 1,370,000 TV: 895,000 Other: 360,000 (15%)
MT	351,000		1,270,491	100,000 (27)	362,000	190,000	236,518	115,000			Marketing: 1,086,750	Magazine: 353,000 TV: 714,000 Outdoor: 90,000 Other: 113,491 (1.5%)
NE	301,963	78,231	300,000	94,000 (47)	217,000	100,000	22,569			302,000	Direct Grants: 75,000	Magazine: 300,000 (None)
NV	868,530	368,567	797,641	166,838 (32)	1,029,375	153,358	125,000	48,016	377,734		Direct Grants: 554,080 Carry-Forward & Misc. 1,360,882	Magazine: 643,389 Newspaper: 150,595 Outdoor: 3,657 (None)
NH	129,669	50,811	425,000	275,000 (37)	160,419	40,000	38,171	50,000	725,000		Equipment: 21,137	Magazine: 40,000 Newspaper: 20,000 Radio: 61,000 TV: 210,000 Other: 94,000 (10%)
NJ	482,000	223,000	4,568,400	702,233 (4)	634,942	400,000	530,425	100,000	150,000	100,000	Historical and Cultural Promotion 50,000	Magazine: 262,000 Newspaper: 270,000 Radio: 1,265,000 TV: 2,586,000 Other: 185,400
NM	646,800	25,100	284,000	169,000 (43)	192,100	175,000	48,700		938,500		Capital Outlay: 20,600	Magazine: 200,000 Newspaper: 44,000 Radio: 40,000 (10%)
NY	1,400,000	Included	15,223,500	Included (1)	1,281,800	1,530,600	228,400		5,800,000		Other: 459,500	(50%)
NC	631,353	645,320	3,001,947	Included (15)	673,134				255,000	1,200,715		(None)

See "Budget — Comments" section for explanatory notes

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase	Advertising: Production (Advertising Rank)	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
MD	232,000	50,000	380,000	24,000 (44)	90,000	110,000	15,000		55,000		Direct Grants: 129,000	Magazine: 235,000 Newspaper: 105,000 TV: 40,000
OH	825,881	447,619	1,148,500	254,980 (23)	607,100	750,400	122,530	45,563	800,000		Direct Grants: 910,000	(30-35%)
OR	1,472,875	413,527	1,943,492	439,613 (30)	698,050	192,312	612,970	148,383	504,034	149,166		Magazine: 665,573 Newspaper: 217,385 Radio: 1,976 TV: 841,285 Outdoor: 215,273 (None)
OK	232,000	168,000	360,000	240,000 (39)	162,000	300,000	308,000	74,000		250,000	Direct Grants: 100,000 Industry Relations/ Hospitality Training 25,000	Magazine: 360,000 Newspaper: 50,000 TV: 50,000 (30%)
PA	167,027	52,808	2,436,162	750,000 (12)	2,387,590	1,416,355	118,221	164,800	6,900,000			Magazine: 36,747 Newspaper: 754,090 TV: 1,582,325 Outdoor: 63,000 (50%)
RI	475,000	110,000	830,000	300,000 (31)	207,000	116,000	80,000	80,000	70,000	171,000	Direct Grants: 222,000	Magazine: 300,000 Newspaper: 170,000 TV: 350,000
SC	1,215,500	623,000	2,300,000	470,000 (17)	715,000	475,000	404,000		1,300,000	45,000	Direct Grants: 100,000	Magazine: 723,000 Newspaper: 697,000 TV: 612,000 Other: 368,000 (None)
SD	563,534	203,955	933,300	(33)	342,796	160,542	13,073	15,800		177,000		Magazine: 117,861 Newspaper: 224,039 Radio: 39,000 TV: 454,500 Outdoor: 97,900 (4%)

See "Budget -- Comments" for explanatory notes

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase (Advertising Rank)	Advertising: Production	Advertising: Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
TN	947,500	418,800	2,865,000 (14)	185,000	500,000	329,300	164,600	80,000	225,000	4,307,600	Direct Grants: 336,800	Magazine: 716,250 TV: 2,148,750 (2.5%)
TX HWYS	1,774,835	77,123	(3)		2,847,068	Included in Printing				687,630	"Texas Highways" Magazine: 4,472,866	
TX TOUR	696,589	671,996	6,288,509 (3)	828,856	343,137	500,000	195,830	179,500			Other Operating Expenses: 874,422	Magazine: 2,534,866 Newspaper: 353,947 Radio: 1,507,922 TV: 1,891,774 (None)
UT	285,057	860,167	1,500,919 (25)		332,662	129,730	21,815	6,500	185,000	219,160	Direct Grants: 154,087	Magazine: 348,213 TV: 894,548 Outdoor: 222,136 Other: 36,022 (None)
VT	477,032	309,195	498,870 (40)	35,000	178,865	309,538	30,000		278,500		Direct Grants: 25,000	Magazine: 110,670 Newspaper: 48,200 TV: 340,000 (1%)
VA	2,129,000	Included	4,210,840 (7)	609,000	381,436	160,000	Included in printing and production	101,000		1,083,979	Direct Grants: 400,000 Other: 849,097	Magazine: 848,357 Newspaper: 384,562 Radio: 443,151 TV: 2,534,770 (None)
WA	507,910	380,113	291,665 (46)	71,082	270,716	187,990	110,874	164,839	277,774	110,194	Ad Agency Consultation: 9,048 Equipment: 5,671	Magazine: 132,411 Newspaper: 127,788 Other: 31,466 (18%)
WV	430,791	96,639	700,000 (38)	Included	300,000	30,000	31,560			12,450		
WI	1,400,000	35,000	2,482,500 (16)	294,000	703,000	750,000	625,500		110,000			Magazine: 74,475 Newspaper: 918,525 Radio: 446,850 TV: 1,017,825 Outdoor: 24,825 (20%)

**See "Budget — Comment" section for explanatory notes

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase (Advertising Rank)	Advertising: Production	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in State)
WY	460,735	269,888	1,180,880 (28)	164,436	194,956	256,826	125,000	60,000	182,000	247,536	Direct Grants: 15,000	Magazine: 465,427 Newspaper: 61,390 Radio: 105,000 TV: 426,852 Outdoor: 110,917 Other: 11,294 (None)
AS	235,500	41,000	80,000		80,000	80,000	48,000					Magazine: 80,000
GU	158,519	111,188	616,961	66,500	278,261	7,500	1,489,071	95,217	600		Direct Grants: 155,500	Magazine: 550,800 Newspaper: 12,828 Radio: 20,000 TV: 33,333 (None)

See "Budget — Comments" section for explanatory notes

BUDGET — 1989-90 PROJECTED

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase (Advertising Rank)	Advertising: Production	Printing and Production	Inquiry Fulfillment	Promotion, Press & PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
AL	1,190,429	1,077,043	1,305,300	75,000	150,000	300,000	85,000	63,000	102,000	710,000	Direct Grants: 175,000	Magazine: 570,300 Radio: 35,000 TV: 570,000 Outdoor: 30,000 (None)
AK DOT	765,600	195,000						164,000	385,100	140,000	Direct Grants: 95,000 Film office: 75,000 Foreign Marketing: 1,030,000 Tourism Attraction Development: 150,900	
AR ATMC	147,500	252,500	4,943,000	440,000	690,000	700,000	240,000	568,000			Canada: 201,000	Magazine: 963,000 Newspaper: 200,000 TV: 2,955,000 Other: 825,000 (None)
AZ	577,100	636,300	2,086,000	432,900	815,700	125,000	100,000	135,000	606,000	34,600		Magazine: 549,216 Radio: 233,000 TV: 1,044,500 Outdoor: 239,100 Other: 30,184 (None)
AR	586,000	944,000	1,300,000	250,000	560,000	550,000	50,000	110,000	705,000	745,000		Magazine: 990,000 Newspaper: 400,000 Radio: 100,000 TV: 1,600,000 Outdoor: 110,000 (9%)
CA	400,000	600,000	3,650,000	140,000	350,000	670,000	690,000					Magazine: 2,270,000 Radio: 380,000 TV: 1,000,000
CO	624,750	293,000	3,480,113	214,887	484,250	1,180,490	229,850	176,000		162,850	Public Affairs/ Direct Marketing: 1,002,810	Magazine: 3,259,985 TV: 188,681 Outdoor: 31,447 (5%)

** See "Budget — Comments" section for explanatory notes**

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase (Advertising Rank)	Advertising: Production	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent In-State)
CT	466,230	114,482	500,000 (45)	30,000	165,300	199,431	223,474	10,510		87,156		Magazine: 300,000 TV: 100,000 (None)
DE	246,400		150,000 (50)		300,000			100,000	305,000		Direct Grants: 179,100 Other: 224,500	
FL	2,898,546	1,056,158	4,271,866 (9)	90,110	25,500	805,000	544,997	148,000		85,425	Other: 27,074	Magazine: 759,693 Newspaper: 19,789 TV: 1,467,384 Outdoor: 25,000 (None)
GA	1,067,352	239,461	1,282,000 (26)	170,000	186,000		300,000	Incl. in Advertising		2,959,364	Other: 1,946,284	Magazine: 675,000 TV: 607,000
HI (STO)	315,623	565,860	(5)				4,738,836*	300,000				
HI (VB)	1,050,762	2,035,364	4,828,387 (5)			990,000	4,893,806*	889,682				
ID	215,800	123,000	809,000 (49)		304,700	173,000	80,000	34,300	1,074,660			Magazine: 275,000 Other: 34,000 (None)
IL	1,306,700	608,600	11,500,000 (2)	Included	667,800	***	1,331,400	Included In Advertising	1,281,000	***	Direct Grants: 5,440,800	
IN	460,000	300,000	1,250,000 (30)	150,000	300,000	300,000	140,000	100,000	300,000			Magazine: 150,000 Newspaper: 50,000 TV: 1,050,000 (10%)
IA	456,205	72,152	1,880,000 (22)	300,000	350,000	165,000	240,000	50,000		700,000*	State Aid: 350,000	Magazine: 100,000 Newspaper: 550,000 Radio: 30,000 TV: 1,300,000 (20%)

** See "Budget — Comments" section for explanatory notes**

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase (Advertising Rank)	Advertising: Production	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
KS	595,316	224,696	212,500 (40)	462,500	305,104	163,111	117,612	100,000		50,752		Magazine: 25,000 Newspaper: 95,000 Radio: 20,000 TV: 10,000 Outdoor: 10,000 Other: 52,500 (66%)
KY	1,171,000	230,500	1,500,000 (24)	300,000	530,000	127,000	225,000	40,000	630,000	420,000		Magazine: 538,000 Newspaper: 194,000 Radio: 118,000 TV: 650,000 (40%)
LA	1,357,292		2,597,257 (30)		641,094	31,000	301,177	82,038		161,805		(none)
MD	256,083	131,073	140,000 (48)	50,000^	100,000	350,000	35,000	80,000	100,000	280,000	Direct Grants: 210,000 Management Studies: 50,000	Magazine: 140,000 Newspaper: 200,000 (None)
MO	999,565	1,322,280	1,001,265 (32)	349,885	843,574	193,100	595,000	12,050	198,500	530,280	Direct Grants: 281,850	Newspaper: 273,277 TV: 427,988 Other: 300,000 (70%)
MA	722,000	135,000	2,700,000 (18)	134,000	100,000	880,000	300,000	75,000	1,106,000	65,000	Direct Grants: 20,000 Other: 763,000	
MI	1,561,582	575,235	3,250,000 (14)		1,250,000	1,050,923	309,960	123,000	2,800,000		Direct Grants: 2,927,300 Promotion: 250,000	Magazine: 510,250 Newspaper: 471,250 TV: 2,268,500 (29%)
MN	1,682,682	947,739	949,594 (33)	388,980	600,100	671,800	52,100	72,230	1,238,500	915,775	Ad Agency Fee: 826,500 Computer Systems: 125,000	Magazine: 65,934 Newspaper: 274,160 Radio: 122,400 TV: 487,100 (18-20%)
MS	900,000	91,000	650,000 (41)					100,000	250,000	290,000		

See "Budget — Comments" section for explanatory notes

State	Personnel Services	Other Administrative Costs	Advertising — Media Purchase (Advertising Rank)	Advertising — Production	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
MD	688,064	98,683	3,174,000 (7)	1,521,123	350,000	135,000	25,000			65,782		Magazine: 267,000 Newspaper: 180,000 Radio: 1,170,000 TV: 1,153,000 Other: 504,000 (15%)
MT	406,791	41,000	1,571,661 (25)	100,000	460,000	200,000	498,061	121,875			Marketing: 1,143,844	Magazine: 180,000 Newspaper: 1,000 Radio: 1,000 TV: 850,000 Outdoor: 100,000 Other: 235,661 (2%)
NE	232,119	147,303	131,000 (47)	100,000	145,000	100,000	25,000	10,000		250,997	Direct Grants: 75,000 Other: 50,000	Magazine: 185,000 Radio: 15,000 TV: 131,000 (5%)
NV	492,205	747,717	940,000 (16)	180,000	500,000	195,000	165,000	60,000	425,000		Direct Grants: 879,184 Carry-Forward & Misc: 532,604	Magazine: 674,382 Newspaper: 158,189 Radio: 80,887 Outdoor: 26,542 (None)
NH	193,166	9,200	362,500 (39)	117,000	100,000	53,200	123,500	50,000	703,250		Direct Grants: 3,000	Magazine: 66,400 Newspaper: 65,000 Radio: 60,000 TV: 158,300 Outdoor: 4,500 Other: 8,300 (10%)
NJ	513,000	159,000	3,934,400 (8)	757,000	1,124,800	500,000	297,000	100,000	250,000	100,000	Historical and Cultural Promotion 50,000	Magazine: 474,800 Newspaper: 653,100 Radio: 1,218,100 TV: 1,588,400

See "Budget — Comments" section for explanatory notes

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase	Advertising: Production	Advertising: (Advertising Rank)	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
NM	271,300	46,000	398,600	157,900	(43)	225,000	197,000	60,000		886,500	351,100	Capital Outlay: 70,000 Welc. Ctr. Constr.: 62,600	Magazine: 288,632 Newspaper: 30,000 Radio: 20,000 TV: 20,000 Other: 40,000 (10%)
NY	1,500,000	Included	11,903,700	Included	(1)	772,000	1,529,300	229,400 321,600		5,800,000		Other:	(50%)
NC	631,353	645,320	3,001,947	Included	(16)	673,134				255,000	1,300,715		(None)
ND	286,000	61,000	519,000	94,000	(42)	100,000	114,000	54,000	95,000	165,000	12,000	Direct Grants: 30,000	
OH	800,000	748,715	835,394	259,595	(37)	644,998	676,000	300,000		300,000		Direct Grants: 830,000 Travel and Supplies: 36,000	(None)
OK	1,734,540	676,591	1,572,250	250,000	(23)	680,716	149,257	480,123	95,750	564,745	118,784		Magazine: 585,865 Newspaper: 131,385 TV: 731,500 Outdoor: 104,500 Other: 19,000 (None)
OR	375,000	365,000	670,000	100,000	(38)	389,000	286,000	285,000	55,000		257,750	Direct Grants: 162,500 Industry Relations/ Hospitality Training 16,250 Welc. Ctr. Constr.: 178,000	Magazine: 540,000 Newspaper: 65,000 TV: 65,000 (20%)
PA	175,400	55,500	3,702,400	430,000	(10)	1,838,980	1,015,350	190,420	115,350	7,200,000		Agency Fee: 1,184,000	Magazine: 964,000 Newspaper: 995,300 Radio: 360,000 TV: 1,482,700 (50%)
RI	450,000	125,000	1,100,093	150,000	(35)	210,000	188,622	100,000	35,000	100,000	250,044	Direct Grants: 75,000 Welc. Ctr. Constr.: 30,000	Magazine: 400,093 Newspaper: 300,000 TV: 400,000 (None)

See "Budget — Comments" for explanatory notes

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase (Advertising Rank)	Advertising: Production	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
SC	1,125,000	675,000	2,400,000 (17)	450,000	855,000	475,000	845,000		1,400,000	50,000	Direct Grants: 200,000 Welc. Ctr. Constr.: 75,000	Magazine: 610,000 Newspaper: 601,000 TV: 641,000 Other: 528,000 (None)
SD	528,954	222,732	1,982,697 (31)		142,796	160,542	70,129	15,800		177,000	Other: 200,000	Magazine: 300,000 Newspaper: 400,600 Radio: 40,000 TV: 642,097 Outdoor: 100,000 (4%)
TN	481,600	411,854	2,865,000 (15)	210,000	525,196	139,000	175,000	91,700 -0	225,000	4,543,700	Direct Grants: 241,100	Magazine: 865,000 TV: 2,000,000 (2.5%)
TX 89YS	1,896,511	69,660	(4)		2,270,224	1,035,800				835,285	"Texas Highways" Magazine: 4,494,900	
TX 7118	805,966	47 949	5,015,456 (4)	851,134	231,500	500,000	332,850	153,500			Other Operating Expenses: 199,550	Magazine: 2,104,136 Newspaper: 103,944 Radio: 936,000 TV: 1,671,380 (None)
UT	485,347	534,523	1,486,860 (29)		444,900	181,354	19,255	6,000	180,000	231,160	Direct Grants: 75,000 Travel Film: 55,000	Magazine: 217,082 Radio: 55,013 TV: 959,025 Outdoor: 220,055 Other: 35,685 (None)
VT	542,207	214,147	498,000 (44)	33,780	168,730	213,800	32,136		278,500		Direct Grants: 25,000	Magazine: 90,000 Newspaper: 45,000 TV: 350,000 Other: 13,000 (1%)
VA			4,594,000 (6)	135,000				114,000				

**See "Budget — Comment" section for explanatory notes

BUDGET — 1989-90 PROJECTED

State	Personnel Services	Other Administrative Costs	Advertising: Media Purchase (Advertising Rank)	Advertising: Production	Printing and Production	Inquiry Fulfillment	Promotion, Press and PR	Research	Matching Funds Program	Welcome Center Operation	Other	Media Purchase Breakdown (Percent in-State)
WA	630,410	276,103	459,700 (46)	53,500	164,932	354,000	143,163	154,564	344,085	112,776		Magazine: 375,000 Newspaper: 50,000 Other: 24,700 (13%)
WV	480,485	156,100	1,232,000 (27)	868,000	175,000	80,000	32,000			26,870		Magazine: 880,000 TV: 240,000 Other: 112,000
WI	1,500,000	100,000	2,490,000 (19)	295,000	1,800,000	1,000,000	1,064,500	250,000	500,000	45,000	Welc. Ctr. Constr.: 15,000	Magazine: 364,500 Newspaper: 170,100 Radio: 145,800 TV: 1,701,000 Other: 48,600 (12%)
WY	460,735	364,888	1,386,250 (28)	307,948	427,028	256,826	200,000	55,000	382,000	247,536	Direct Grants: 15,000	Magazine: 353,750 Newspaper: 76,000 Radio: 120,000 TV: 666,500 Outdoor: 150,000 Other: 20,000 (None)
AS	235,500	12,000			90,000	20,000	68,000					(None)
GU	168,370	598,628	877,512	108,770	567,166	38,800	1,072,941	60,665	40,000		Direct Grants: 355,500	Magazine: 761,957 Newspaper: 8,630 Radio: 106,925 (None)

See "Budget — Comments" section for explanatory notes

Promotion Budget Allocation 1989-90				Foreign Advertising Allocation 1989-90				
State	Budget for Solicitation of Conventions?	Participation in Travel Shows 1989-90 Budgeted Amount?	Total Number Domestic Int'l Consumer Trade	Total FOREIGN Promotion & Media Advertising Budget	Dollar Amount Allocated by MEDIUM		Dollar Amount Allocated by COUNTRY	
AL	No	$100,000	TOTAL: 7 D-7; I-2; T-4	10,063	Tourism Development Ad	10,063	Japan:	10,063
AZ DOT	Yes	35,000	TOTAL: 18 D-5; I-8 C-3; T-2	1,090,000	Magazines: Trade Shows: Other:	386,900 52,000 591,100	Canada: Germany: Japan: Other countries*:	90,000 310,000 500,000 130,000
AZ ATHC	No	None	None	201,000	Magazines:	201,000	Canada:	201,000
AZ	No	50,000	TOTAL: 24 D-14; I-10 C-6; T-18	7,000	Magazines:	7,000	Other: Visit U.S. West	7,000
AR	Yes	25,000	TOTAL: 9 D-9; C-9	50,000	Trade Shows: Salary Matching: Literature:	3,000 47,000	Japan:	50,000
CA	No		TOTAL: 19 D-6; I-13; T-19	730,000	Publicity, Promotion, Sales Missions, Advertising, Brochures:	730,000		
CO	No	61,500	TOTAL: 18 D-5; I-13 C-1; T-17	213,700	Trade shows: Other:	30,000 183,700	Canada: United Kingdom: W. Europe: Japan: Other:	5,000 85,000 35,000 50,000 38,700
CT	Yes	22,615	TOTAL: 6 D-5; I-1 C-1; T-5	None				
DE	No	5,500	TOTAL: 6 D-3; I-3; C-3; T-3					
FL	Yes	80,000	TOTAL: 27 D-27; C-6; T-21	1,638,013	Magazines: Newspapers: TV: Trade Shows: Outdoor:	462,354 19,789 579,914 546,544 29,412		
GA	No	90,000	TOTAL: 12 D-8; I-4	250,000	Magazines: Newspapers: Employees:	120,000 30,000 100,000	Canada: United Kingdom: Japan:	60,000 90,000 100,000
HI STO	Yes	1,860,000	TOTAL: 75					
ID	Yes	5,500	D-1; I-3; C-3; T-4	13,500			United Kingdom: Japan:	3,000 10,500
IL	Yes	75,000		1,500,000				
IN		25,000	TOTAL: 13 D-11; I-2	25,000	Newspapers: TV: Trade Shows: Other:	7,500 7,500 5,000 5,000	United Kingdom: Germany: Japan:	10,000 10,000 5,000
IA	Yes	15,000	TOTAL: 7	8,000	Trade Shows: Brochure:	3,000 5,000	Japan:	8,000

See "Budget — Comments" section for explanatory notes

Promotion Budget Allocation 1989-90				Foreign Advertising Allocation 1989-90		
State	Budget for Solicitation of Conventions?	Participation in Travel Shows 1989-90 Budgeted Amount?	Total Number: Domestic, Int'l Consumer, Trade	Total FOREIGN Promotion & Media Advertising Budget	Dollar Amount Allocated by MEDIUM	Dollar Amount Allocated by COUNTRY
KS	No	15,000	TOTAL: 5-7 D-5-7; C-1-2; T-3-5	None		
KY	No	20,000	TOTAL: 24 D-23; I-1; C-12; T-12	53,100	Magazines: 1,125 Trade Shows: 19,975 Fam Tours, Trade Missions, Brochures: 32,000	Canada: 2,500 United Kingdom: 21,925 Germany: 17,200 France: 5,200 Japan: 6,275
LA	No	None	TOTAL: 12 D-4-5; I-2-3 T-4-5	Undetermined		
ME	Yes	10,000	TOTAL: 8 D-5; I-3 T-All	20,000	Newspapers: 2,000 Trade shows: 10,000 Admin. Costs: 5,000 Promotion Pieces: 3,000	Canada: 10,000 United Kingdom: 5,000 Germany: 2,000 France: 2,000 Japan: 1,000
MD	Yes	50,000	TOTAL: 25 D-14; I-6; C-4	225,000	Newspapers: 165,000 Trade Shows: 30,000 Promotion: 30,000	Canada: 60,000 United Kingdom: 100,000 Germany: 25,000 Japan: 10,000 Other: 30,000
MA	No		TOTAL: 12	450,000		
MI	No	15,000*	TOTAL: 10-12 D-10-12; C-10-12	None		
MN	No	64,500	TOTAL: 13 D-13	12,000	Magazines: 6,000 Trade Shows: 6,000	United Kingdom: 2,000 Germany: 8,000 Japan: 2,000
MS	No	50,000	TOTAL: 9 I-3; C-4; T-2	None		
MO	No	None	TOTAL: 6 D-6; C-6	40,000	Magazines: 40,000	Canada: 20,000 United Kingdom: 20,000
MT	Yes	17,000	TOTAL: 8 D-7; I-1; C-2; T-6	241,000	Magazines: 5,000 TV: 100,000 Trade Shows: 6,000 European Representation/ Outdoor Boards: 130,000	Canada: 210,000 Western Europe: 31,000
NE	No	11,200	I-1; C-3; T-3	None		
NV	No	111,750	TOTAL: 20 D-15; I- 5; C- 3; T-17	99,667		Canada: 34,284 Mexico: 1,800 United Kingdom: 866 Germany: 518 Japan: 2,734 Australia: 3,215 Taiwan: 56,250
NH	No	6,000	TOTAL: 3 D-2; I-1 C-2; T-1	None		
NJ	Yes	10,000	TOTAL: 6 D-4; I-2; C-4; T-2	88,750	Magazines: 8,750 Newspapers: 80,000	Canada: 80,000 United Kingdom: 8,750
NM	No	49,900	TOTAL: 7 D-5; I-2; C-1; T-6	None		

See "Budget — Comments" section for explanatory notes

Promotion Budget Allocation 1989-90				Foreign Advertising Allocation 1989-90				
		Participation in Travel Shows						
State	Budget for Solicitation of Conventions?	1989-90 Budgeted Amount?	Total Number: Domestic, Int'l Consumer, Trade	Total FOREIGN Promotion & Media Advertising Budget	Dollar Amount Allocated by MEDIUM		Dollar Amount Allocated by COUNTRY	
NY	Yes	11,500	TOTAL: 4 I-1; T-3	61,000	Public Relations:	61,000		
NC	No	None	TOTAL: 8 D-5; I-3	None				
ND	No	27,500	TOTAL: 5 D-5; C-0	Undetermined				
OH	No	6,000	TOTAL: 19 D-16; I-3; C-10; T-9	15,000			*	
OK	Yes	108,773	TOTAL: 24 D-19; I-5; C-16; T-8	79,196	Magazines: Trade Shows: Other:	14,000 41,568 23,628	Canada: United Kingdom: Germany: Israel: Italy: Other:	6,233 26,837 9,540 360 720 35,506
OR	No	74,000	TOTAL: 9 D-5; I-4 C-2; T-7	175,000	Trade Shows: P.R. Activities:	19,000 156,000	Germany: Japan:	87,500 87,500
PA	Yes	36,000	TOTAL: 6 D-5; I-1; T-6	55,000	Newspapers: Trade Shows:	49,000 6,000	Canada:	55,000
RI	No	40,000	TOTAL: 8 D-4; I-4; T-8	60,000				
SC	Yes	80,000	TOTAL: 28 D-22; I-6; C-12; T-16	540,000				
SD	Yes	26,000	TOTAL: 10 D-10; C-10	None				
TN	Yes	142,000	TOTAL: 27 D-22; I-5; T-27	43,983	Trade Shows: Dues/Subscriptions:	43,050 933	Canada: United Kingdom: Germany: Japan: Other:	9,571 17,863 8,965 6,651 933
TX H&WYS	No	None	None	None				
TX TOUR	No	140,000	TOTAL: 40 D-12; I-20 C-8; T-24	520,000	Magazines: Newspapers: TV: Trade Shows: Promotions:	160,000 16,000 84,000 140,000 120,000	Canada: Mexico: United Kingdom: Germany: Japan:	75,000 149,000 197,000 30,000 69,000
UT	No	42,050	TOTAL: 10 I-10; T-10	7,000	Newspapers: Trade Shows:	2,000 5,000	Japan:	7,000
VT	Yes	32,000	TOTAL: 8 D-6; I-2; T-8	55,000	Magazines: Newspapers: Trade Shows:	17,000 6,000 32,000	Canada: United Kingdom: Germany:	50,000 4,000 1,000
WA	No	11,113	TOTAL: 10 D-5; I-5; C-1; T-9					
WV	Yes	30,000	TOTAL: 14 D-13; I-1 C-8; T-5	None				
WI	Yes	40,000	TOTAL: 13 D-3; I-2; C-8	40,000	Other:	40,000		

See "Budget -- Comments" section for explanatory notes

Promotion Budget Allocation 1989-90				Foreign Advertising Allocation 1989-90				
State	Budget for Solicitation of Conventions?	Participation in Travel Shows 1989-90 Budgeted Amount?	Participation in Travel Shows Total Number: Domestic, Int'l Consumer, Trade	Total FOREIGN Promotion & Media Advertising Budget	Dollar Amount Allocated by MEDIUM		Dollar Amount Allocated by COUNTRY	
WY	No	72,000	TOTAL: 9 D-6; I-3; C-6; T-3	118,500	Magazines: Trade Shows: Other:	65,000 25,000 28,500	Canada: United Kingdom: Germany: France: Japan: Australia: Taiwan: Other:	15,000 13,500 15,500 9,500 26,000 18,000 8,500 12,500
AS	No	12,000	TOTAL: 2	12,000				
GU		384,600	TOTAL: 17 I-8; C-2; T-7	1,479,675	Magazines: Newspapers: Radio: Trade Shows: Other:	645,260 8,630 106,925 384,600 334,260	Canada: Germany: Japan: Australia: Korea/Taiwan/ Philippines	58,000 65,500 918,175 229,000 209,000

See "Budget -- Comments" section for explanatory notes

State	Explanatory Notes
AK DOT	*Other countries include Korea, Australia, and Taiwan.
AR	Arkansas has a biennial budget. The second year of the biennium (1989-90) is determined at a continuing level from the first year, with only a few minor additions.
CA	*The 1988-89 actual budget covered the 10 months from September 1988 through June 1989 only.
HI STO	*The Promotion, Press and PR category includes all marketing expenses other than advertising. The state's newly initiated strategic planning process for tourism was used to help establish budget priorities for the 1989-90 fiscal year. Marketing and promotion expenditures are more comprehensive and more cognizant of the future as a result. In addition to maintenance of base markets, more emphasis is given to existing markets which are not fully developed; to cultivation of new markets; and to meetings and conventions. Research expenditures are also more long-term in focus, and are being directed toward projects which are intended to help Hawaii minimize threats to and maximize opportunities for its visitor industry in the future.
HI HVB	*The Promotion, Press and PR category includes all marketing expenses other than advertising.
IN	Indiana has a biennial budget.
IA	*Allocation includes operation and construction of welcome centers.
KS	*The Kansas Travel & Tourism Division budget also includes additional non travel-related allocations for state film services, and for the Kansas Magazine. In both the 1988-89 and 1989-90 budgets these allocations were $470,982 and $516,897, respectively.
ME	Maine has a biennial budget, composed of two parts. The Part I Continuation Budget request was completed by analyzing the prior two-year operating expenditures of the Division of Tourism and adjusting for inflation to provide services at the same level. The Part II Expansion Budget request consisted of new program initiatives and employee and operating expense increases for program expansions determined to be necessary and appropriate by the Office of Tourism and other departmental staff. The budget requests are submitted to the state budget office for review, recommendation and approval, and is subject to final approval by the legislature.
MI	*Funds budgeted for travel shows are made available to cooperative partners. The travel office staff does not attend shows.
MN	Each year of the biennial budget is apportioned by the legislature at the beginning of the biennium.
MS	*Printing/production, inquiry fulfillment, promotion/press, and PR costs are contained in the Division of Communications/Advertising's budget which handles such needs for the entire agency.
MO	*The amount reported in "production" for FY 88-89 includes $205,000 for research conducted through the advertising agency, and $265,397 for printing and fulfillment. The amount reported in "production" for FY 89-90 includes $183,000 for research to be conducted through advertising agency and $375,318 for printing and fulfillment.
NV	Nevada has a biennial budget.
NH	New Hampshire has a biennial budget.
NY	*Budget totals include the Division of Tourism's budget allocation, plus the media purchase and production budget for the Division of Marketing and Advertising, which is primarily devoted to tourism advertising and promotion.
NC	North Carolina has a biennial budget, which is prepared by the state budget office.
ND	North Dakota has a biennial budget.
OH	*Advertising & promotion in Canada is included in the domestic budget. Advertising & promotion in the United Kingdom, Germany and France is done in cooperation with the Great Lakes States. Ohio has a biennial budget. Fiscal year 1989-90 is set by the legislature. Fiscal years 1989-90 are the first years of the current biennium budget of $10,694,940 for Travel and Tourism.
OK	*The Tourism tax is a broad-based industry tax including lodging, food service, transportation services, attractions and events admissions, etc.
OR	Oregon has a biennial budget.
TX HWYS	*1/12 of the 6% state sales tax collected from commercial lodging is dedicated to the Texas Department of Commerce for tourism advertising. As a division of the state Department of Highways & Public Transportation, the budget of the Travel & Information is derived from the same sources that support the department, which are constitutionally committed highway revenues, plus some additional general revenues. Texas has a biennial budget. The Texas legislature meets every two years and allocates funds to state agencies based upon the agencies' Legislative Appropriations Requests. Even though the appropriations are made every two years, the requests have funds specified in each of the two years. Funds left from one year cannot be carried forward to the second year of the biennium. The 1989-90 projected budget figures are based on the allocation already received for Fiscal Year 1990.

State	Explanatory Notes
TX TOUR	The Texas Tourist Division has a biennial budget (see Texas-HWYS response).
VT	Vermont has a biennial budget.
VA	Virginia has a biennial budget. The amount is approved by the General Assembly.
WA	Washington tourism is funded on a biennium basis, based in part on annual expenditures.
WI	Wisconsin has a biennial budget, determined by Department of Development recommendation, legislative action, and Governor signature as part of total state budget bill.
WY	Wyoming has a biennial budget.

State	Current Travel Promotion Theme or Slogan	Out-of-State Cities in Which Information Centers are Located	Foreign Cities or Countries in Which Travel Office is Represented	Official Name of Annual State Travel Conference	Month Conference Normally Held	Toll-Free Telephone Number for Travel Information Inquiries
AL	Alabama! The State of Surprises!	None	West Germany Japan Korea Switzerland	Alabama Hospitality & Tourism Conference	April	In-state: 800-392-8096 Out-of-state: 800-ALA-BAMA
AK DOT	Once you've gone to Alaska, you never come all the way back.	None	Tokyo, Japan Frankfurt, W.Germany Seoul, S. Korea	Alaska Visitors Association Annual Conference	October	None
AZ	Arizona. If you knew it, you'd do it.	None	None	Annual Arizona Governor's Tourism Symposium	January	None
AR	Arkansas . . . The Natural State	None	*	Governor's Conference on Tourism	March/ April	800-NATURAL
CA	Discover the California	None	None	Governor's Conference on Tourism*	March	800-TO-CALIF
CO	None	None	Great Britain	Colorado Tourism Conference	April	800-433-2656
CT	CLASSIConnecticut The Pride of New England	New York, NY* Sturbridge, MA Plymouth, MA	Frankfurt, W.Germany Tokyo, Japan	Connecticut Tourism Week	May	800-CT BOUND
DE	Delaware. Small Wonder. All the places you'd rather be.	None	None	N/A	TBA	In-state: 800-282-8667 Out-of-state: 800-441-8846
DC	Washington is a Capital City	None	None	None		Hotels/attractions: 800-422-8644*
FL	See Florida Coast to Coast to Coast	None	London, England Toronto, Canada Coral Gables, FL Latin American Market*	Florida Governor's Conference on Tourism	September	None
GA	Georgia on My Mind	None	Brussels, Belgium Tokyo, Japan Toronto, Canada Seoul, S.Korea	Georgia's Governor's Tourism Conference	September	800-VISIT-GA
HI HVB	Come To Life In Hawaii	Regional Offices: New York, NY Chicago, IL San Francisco, CA Los Angeles, CA Convention Office: Washington, DC	Tokyo, Japan Hong Kong Australia New Zealand England Canada	None	N/A	None
ID	Idaho. Discover the Undiscovered America	None	Seoul, S.Korea Taipei, Taiwan	Governor's Conference on Tourism	May	Out-of-state: 800-635-7820
IL	Illinois, The American Renaissance	None	Brussels, Belgium San Paulo, Brazil Hong Kong Shenyang, China Tokyo & Osoha, Japan Moscow, USSR Mexico City, Mexico Toronto, Ontario	Governor's Conference on Tourism	May	800-223-0121
IN	Come on IN Indiana	None	Tokyo, Japan London, England Netherlands Taipei, Taiwan	Lt. Governor's Conference on Tourism	March	800-289-ON IN

See "General Promotion -- Table 2" for explanatory notes

GENERAL PROMOTION — TABLE 1

State	Current Travel Promotion Theme or Slogan	Out-of-State Cities in Which Information Centers are Located	Foreign Cities or Countries in Which Travel Office is Represented	Official Name of Annual State Travel Conference	Month Conference Normally Held	Toll-Free Telephone Number for Travel Information Inquiries
IA	The Time Is Right To Discover Iowa Treasures	None	Frankfurt, Germany Hong Kong Tokyo, Japan	Iowa Conference on Tourism	October	800-345-IOWA
KS	Ah! Kansas America's Central Park Linger Longer	None	None	Governor's Conference on Tourism	September	800-252-6727
KY	The Uncommon Wealth of Kentucky	None	None	Fall Travel Conference	October	800-225-TRIP In- and out-of state, Ontario and Quebec
LA	Louisiana. We're Really Cookin'	None	None	Governor's Conference on Tourism	October	Consumer:* 800-33-GUMBO Travel Industry: 800-227-4FUN
ME	Maine. The Way Life Should Be	New England Vacation Center, New York, NY	None	Governor's Conference on Tourism	October	800-533-9595*
MD	Maryland ... More than You Can Imagine	None	None	Governor's Tourism Conference	October	800-331-1750 Operator 250
MA	The Spirit of Massachusetts is the Spirit of America	New York, NY	Tokyo, Japan London, England	Governor's Conference on Travel and Tourism	April	800-447-MASS (Guide book only)
MI	YES MICHIGAN	None	None	Governor's Conference on Tourism	April	800-5431-YES
MN	Explore Minnesota	None	None	Minnesota Conference on Tourism	January	In-state: 800-657-3700 Twin Cities: 296-5029
MS	Mississippi: More Than A River	None	Taipei, Taiwan Tokyo, Japan	Governor's Conference on Tourism	September	800-647-2290 Events Hotline:* 800-822-6477
MO	Wake Up to Missouri	None	Japan Germany	Missouri's Governor's Conference on Tourism	November	None
MT	Montana Unspoiled. Unforgettable!	None	Tokyo, Japan Taipei, Taiwan	Governor's Conference on Travel	May	Out-of-state: 800-541-1447
NE	Come See What We're Up To Now!	None	None	Annual Governor's Travel Industry Conference	February	In-state: 800-228-4307 Out-of-state: 800-742-7595
NV	Discover Both Sides of Nevada	Washington, DC San Francisco, CA	Tokyo, Japan Taipei, Taiwan	Governor's Conference on Tourism	October	800-NEVADA-8
NH	New Hampshire Cruise On Up	New York, NY Boston, MA Providence, RI	United Kingdom*	Annual Governor's Conference	May (Nat'l Tourism Week)	Out-of-state: 800-258-3608**
NJ	New Jersey and You . . . Perfect Together	None	Canada	Governor's Conference on Tourism	Spring	800-JERSEY-7
NM	New Mexico USA. Land of Enchantment	None	None	Governor's Conference on Tourism		Out-of-state: 800-545-2040

See "General Promotion — Table 2" for explanatory notes

State	Current Travel Promotion Theme or Slogan	Out-of-State Cities in Which Information Centers are Located	Foreign Cities or Countries in Which Travel Office is Represented	Official Name of Annual State Travel Conference	Month Conference Normally Held	Toll-Free Telephone Number for Travel Information Inquiries
NY	I Love New York	None	London, England Toronto, Canada Montreal, Canada Tokyo, Japan Frankfort, W.Germany	I Love New York Tourism Conference	Fall	800-CALL-NYS
NC	Variety Vacationland	None	None	Governor's Conference on Travel & Tourism	May	800-VISIT-NC
ND	Discover the Spirit	None	None	Conference on Tourism	April	In-state: 800-472-2100 Out-of-state: 800-437-2077 Canada: 800-537-8879
OH	Ohio . . . The Heart of It All	None	Belgium Japan Africa Canada	Governor's Conference on Tourism . . . Tourism 2000	April	National: 800-BUCKEYE Canada: 800-533-5222 Ontario, Quebec: 614-462-4951
OK	Discover Oklahoma!	None	None	Oklahoma Travel Industry Conference	First week of November	800-552-6552
OR	Oregon. Things Look Different Here.	None	Tokyo, Japan Taipei, Taiwan Seoul, S. Korea	Governor's Tourism Conference	April	Out-of-state: 800-547-7842 In-state: 800-543-8838
PA	Pennsylvania: America Starts Here	None	None	None	N/A	800-VISIT PA* 800-237-4363**
RI	America's First Resort	New York, NY*	Antwerp, Belgium	Governor's Conference on Tourism	May	Out-of-state: 800-556-2434
SC	Smiling Faces -- Beautiful Places	None	Frankfurt, W. Germany London, England	South Carolina Governor's Conference on Travel	February	Yes*
SD	Best Route West	None	None	Governor's Tourism Conference	January	In-state:* 800-952-2217 Out-of-state: 800-843-1930
TN	Tennessee . . . We're Playing Your Song	None	None	Governor's Conference on Tourism	September	Various*
TX H&YS	Texas	None	None	Texas Travel Summit	September	
TX TOUR	Texas! It's Like A Whole Other Country	None	None	Texas Travel Summit	September	800-888-8TEX
UT	The Greatest Snow on Earth Best of the West	None	Brussels, Belgium Tokyo, Japan Seoul, S. Korea Taipei, Taiwan	Tourism Section, Governor's Conference on Economic Development	February	None
VT	Vermont. A Special World	New York, NY (co-shared)	None	Vermont Travel Conference	November	Used seasonally; not year round
VA	Virginia Is For Lovers	New York, NY Washington, D.C.	United Kingdom Germany France Japan	Governor's Travel & Tourism Conference	October	800-VISIT VA
WA	Washington State. It's a real experience	None	Tokyo, Japan	Team Washington: Tourism Conference	October*	800-544-1800**
WV	West Virginia A Welcome Change	None	None	WV Conference on Tourism	October	In/Out-of-State: 800-CALL WVA

See "General Promotion — Table 2" for explanatory notes

GENERAL PROMOTION — TABLE 1

State	Current Travel Promotion Theme or Slogan	Out-of-State Cities in Which Information Centers are Located	Foreign Cities or Countries in Which Travel Office is Represented	Official Name of Annual State Travel Conference	Month Conference Normally Held	Toll-Free Telephone Number for Travel Information Inquiries
WI	Wisconsin. You're Among Friends	Chicago, IL	Frankfurt, W.Germany Tokyo, Japan	Governor's Conference on Tourism	February	800-372-2737*
WY	Find Yourself in Wyoming	None	Brussels, Belgium Sydney, Australia Taipei, Taiwain Tokyo, Japan	Wyoming Governor's Conference on Tourism	May	Out-of-state: 800-225-5996
AS	Come Share Our World	*	Sydney, Australia	None		None
GU	Gateway to Micronesia	New York, NY	Tokyo, Japan Taipei, Taiwan Seoul, S.Korea Frankfurt, W.Germany Toronto, Canada Sydney, Australia	PATA Micronesia Chapter Annual Membership Meeting	July	800-228-GUAM

See "General Promotion -- Table 2" for explanatory notes

State	Explanatory Notes
AZ	Agency budget request for fiscal year 1990/1991 includes an appropriation for a Washington, D.C. office.
AR	*The Arkansas Industrial Development Commission has offices in Brussels, Belgium; Tokyo, Japan; and Taipei, Taiwan.
CA	*We endorse the Western Tourism Conference, sponsored by the Western Association of Convention & Visitors Bureaus.
CO	Travel offices representing Colorado will be established in Western Europe and Japan during fiscal year 1990.
CT	*We share the New England Vacation Center with the other New England states. Promotion efforts also include a tourism film, a state-wide slide show, the developing of regional tourism councils, a welcome center at Bradley International Airport, joint New England promotion under the auspices of New England Governors' Conference and a continuing effort to attract movie and television program production. The toll-free number is now nationwide. Tourism Week includes the Annual Unity Dinner where the Governor presents Travel Achievement Awards.
DC	*Toll-free number for a brochure on hotels and attractions.
FL	*Out-of-state travel offices are full-time state offices staffed with Tourism Division employees. The London office has 2 employees, Toronto has 2 and the Latin American office in Coral Gables, FL has 3 employees.
GA	We conduct annual promotional Whistle Train Stops to the East Coast and the Midwest.
LA	*Both toll-free numbers are for out-of-state callers only.
ME	*Limited to fall and winter seasons, northeast only, for foliage and ski reports. Toll-free number is also used for specific response material.
MD	The toll-free number is for tourist inquiries only.
MA	Massachusetts is represented with other northeastern states in the New England Vacation Center. The London and Tokyo offices are shared with the other New England states.
MN	Minnesota uses toll-free telephone response services in Omaha, NE, and Grand Rapids, MN for TV and some print responses.
MS	*We have instituted an "Events Hotline" for Mississippi and contiguous states which provides weekly calendar of events information.
NH	*In cooperation with New England USA. **For ME, VT, CT, MA, RI, NY and parts of NJ only. This telephone, as well as a 24-hour taped toll number (603-224-2525) is currently used to give events of the week in New Hampshire. It gives status of the foliage statewide in autumn, and ski conditions are given in winter. The numbers for the state-owned Cannon and Suncapee Mountains are 800-552-1234 and 800-322-3300, respectively. The number for cross country skiing information is 800-262-6660.
NJ	Print campaign includes the theme, "America the Beautiful - Only Smaller".
NY	Theme line: "The beauty only begins with the scenery." Toll-free number is accessible in the continental United States, plus in Canada during Canadian advertising program.
OH	A partially automated answering system has been added to expand operation services of the toll-free travel information number to 24 hours a day.
OK	*While the state still does not operate any out-of-state information offices, the Oklahoma Department of Commerce maintains offices in Japan, China, Singapore and India. **Telephones are manned 8:00 a.m. to 12:00 midnight on weekdays, 8:00 a.m. to 6:00 p.m. on weekends and holidays. All other calls are answered by an automated system.
PA	*For single copies of state travel guide only. **Travel Marketing Bureau office, Harrisburg, PA.
RI	*New York office operated cooperatively with New England states.
SC	*A toll-free number was used during the spring and fall TV and print campaign.
SD	*South Dakota maintains a special toll-free number for fishing and snow information. This nationwide number is 800-445-3474.
TN	*Our advertising carries toll-free numbers contracted with a telemarketing service. Different numbers were used to enable source tracking. The numbers are for ad response only and not for general information inquiries.

GENERAL PROMOTION — TABLE 2

State	Explanatory Notes
TX HWYS	*The Travel and Information Division of the Texas Department of Highways and Public Transportation is instigating a 1-800 toll-free telephone number for travel information inquiries. The phone number is not available at this time but should be operational by 1990.
VA	Celebrated the 20th anniversary of state travel slogan in 1989.
WA	*Considering date change for annual conference to March. **The toll-free telephone number is for requesting travel planning guide only; all other requests transmitted to travel office via electronic mail and/or referred to regular travel office phone number.
WV	Toll-free number is used for tourist information, state park reservations and ski reservations.
WI	*Toll-free number covers Wisconsin and surrounding states of Minnesota, Michigan, Northern Illinois and Iowa. We also use a telemarketing service for advertising which provides national toll-free numbers.
WY	Wyoming has contracted with Motivators, Inc. to represent us in Europe; we work in a public/private partnership to maintain offices in Taipei, Tokoyo, and Sydney.
AS	*Due to limited funding, we can only use the ASG Liason Office in Hawaii, California and Washington, D.C.
GU	There is a representative office at: China Express (Taiwan); 68 Chung Shan Nt. Rd.; Sec. 2, Taipei, Taiwan; (886) 571-6585 The representative is Mr. Philip Niu.

State	Development of Package Tours Facilitated?	Package Tour Literature Distributed?	Publish & Distribute Package Tour Catalog — Done in 1988?	Publish & Distribute Package Tour Catalog — Planned for 1989?	Publish & Distribute Package Tour Catalog — No. of Tours	Conduct Fam Tours Related to Catalog — Done in 1988?	Conduct Fam Tours Related to Catalog — Planned for 1989?	Package Tour Development — Budget Allocated?	Package Tour Development — Staff Member Assigned?	Additional Comments
AL	Yes	Yes	No	No		No	No	No	No	
AK DOT	No	No	No	No		Yes	Yes	Yes	No	These are only for Japanese and Korean markets.
AK ATMC	No	No	No	No		No	No	No	No	
AZ	Yes	Yes	Yes	Yes	16	Yes	Yes	Yes	Yes	
AR	Yes	No	Yes	Yes	*	Yes	Yes	Yes	Yes	*Specific tours are not outlined in the Group Tour Planners. Attractions, restaurants, lodging facilities are listed that accomodate motor coach tours.
CA	Yes	No	No	Yes	varies	No	No	No	No	
CO	Yes	No	No	No		No	No	Yes	Yes	A tour planning guide was published and distributed during fiscal year 1989, but it does not contain information on package tours. The guide provides information necessary for developing package tours.
CT	Yes	Yes	No	No				Yes	Yes	
DE	Yes	Yes	No	Yes	*	No	Yes	No	Yes	*The number of tours in the catalog is not determined yet.
DC	Yes	No	No	No		No	No	No	No	
FL	Yes	Yes	No	No		Yes	Yes	Yes	Yes	We distribute a large quantity of material through our warehouse that we do not publish. Additionally, we provide Florida brochure shells for operators who meet certain guidelines.
GA	No	No	No	No		Yes	Yes	Yes	Yes	We have a booklet of 10 suggested travel itineraries that are distributed to tour operators and other interested parties; published in late 1987.
HI STO	No	No	No	No		No	No	No	No	
ID	Yes	Yes	Yes	Yes	26	Yes	Yes	Yes	Yes	
IL	Yes	Yes	Yes	Yes		No	No	No	No	
IN	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes	One of the functions of the Tourism Information and Promotion Fund is to assist Indiana not-for-profit firms in promoting package tours. The annual Lt. Governor's Conference has speakers which address the "how to" issues of packages.
IA	Yes	Yes	No	Yes			Yes	Yes	Yes	
KS	Yes	Yes	No	Yes		Yes	Yes	Yes	Yes	
KY	Yes	Yes	Yes	Yes	8	Yes	Yes	Yes	Yes	We conduct 4 to 5 FAM tours each year.
LA	Yes	Yes	Yes	No	2	No	No	No	No	The Office of Tourism does conduct FAM tours throughout the state 4-6 times a year but not in relation to our tour package program in the 1988 brochure.
ME	No	No	No	No		No	No	No	Yes	This office assists the industry with its own individual tour package development.

State	Development of Package Tours Facilitated?	Package Tour Literature Distributed?	Publish & Distribute Package Tour Catalog: Done in 1988?	Publish & Distribute Package Tour Catalog: Planned for 1989?	Publish & Distribute Package Tour Catalog: No. of Tours	Conduct Fam Tours Related to Catalog: Done in 1988?	Conduct Fam Tours Related to Catalog: Planned for 1989?	Package Tour Development: Budget Allocated?	Package Tour Development: Staff Member Assigned?	Additional Comments
ME	No	No	No	No		No	No	No	Yes	This office assists the industry with its own individual tour package development.
MD	Yes	Yes	No	Yes	22*	No	No	Yes	Yes	*The MD Office of Tourism Development markets and promotes package tours produced by Maryland's travel industry. OTD developed a direct mail piece listing package tours for the winter holidays targeted to groups; internationally OTD has produced the Maryland Menu which lists package tours directed to the international wholesaler group; 14 tours direct mail, 8 MD menu.
MA	Yes	Yes	Yes	No	36	No	No	Yes	Yes	State package tour catalog was for travel agents only.
MI	No	No	No	No		No	No	No	No	
MN	Yes	Yes	Yes*	No	7	No	No	Yes	Yes	*We published a Group Tour Planner.
MS	Yes	Yes	No	Yes		Yes	Yes	No	Yes	
MO	Yes	No	No	Yes	varies	Yes	Yes	Yes	Yes	The State of Missouri provides a group tour planner which lists (by region) attractions, accommodations and services. We do not, however, promote specific tours but are active in helping any and all group tour operators develop tours in state.
MT	Yes	Yes	Yes	Yes	*	Yes	Yes	Yes	Yes	*We publish a group tour planning guide for tour wholesalers/operators. Suggested itinerary information is included. We customize tours for individual companies.
NE	Yes	Yes	No	No		Yes	Yes	Yes	Yes	
NV	Yes	Yes	No	Yes		Yes	Yes	Yes	Yes	
NH	Yes	Yes	No	No		No	No	No	No	Program is planned for the future.
NJ	Yes	Yes	Yes	Yes	12					
NM	Yes	Yes	Yes	Yes	8	No	No	No	Yes	
NY	No	No	No	No		No	No	No	*	*Staff assigned to group tour development.
NC	No	No	No	No		No	No	No	No	
ND	Yes*	Yes	No	Yes		No	No	Yes	Yes	*We promote group travel to North Dakota. However, we do not package tours per se.
OH	Yes	Yes*	No	Yes		No	Yes	Yes	Yes	*Customized for specific requests.
OK	Yes	No	No	No		No	No	No	Yes	The state tourism office will assist in developing custom itineraries and will publish a tour catalog when appropriate tours are in place in sufficient quantity. An America's Heartland region catalog is being developed for the international market and will include Oklahoma in the itineraries.
OR	Yes	Yes*	Yes	Yes				No	No	*We do not promote specific packages, but rather provide travel planners with suggested itineraries and routes, and offer trip planning assistance. In addition, our Group Tour Planner visits receptive operators for further information.

State	Development of Package Tours Facilitated?	Package Tour Literature Distributed?	—Publish & Distribute Package Tour Catalog— Done in 1988?	Planned for 1989?	No. of Tours	Conduct Fam Tours Related to Catalog Done in 1988?	Planned for 1989?	—Package Tour Development— Budget Allocated?	Staff Member Assigned?	Additional Comments
PA	No	No	No	No		No	No	No	No	
RI	Yes	Yes	No	No		No	No	Yes	Yes	
SC	Yes	No	No	No		No	No	No	No	
SD	Yes	Yes	Yes	Yes	4	Yes	Yes	Yes	Yes	
TN	Yes	No	No	No		No	No	Yes	Yes	We publish a tour planning guide with suggested itineraries and other collateral material to assist tour planners. We have an extensive co-op advertising program for tour operators to help promote packages.
TX TOUR	No	No	No	Yes		Yes	Yes	Yes	Yes	
UT	No	Yes	Yes	Yes	130	No	No	No	No	
VT	Yes	Yes	No	No		No	No	No	No	
VA	Yes	Yes	No	Yes		Yes	Yes	No	Yes	
WA	Yes	Yes	No	No		Yes	Yes	Yes	Yes	The WSTPG, a comprehensive resource information guide compiled and distributed to facilitate development and operation of more package tours in Washington, was published for the first time in 1987. Updated in 1988, it was reprinted for 1989.
WV	Yes	Yes	No	Yes		No	Yes	No	Yes	
WI	Yes	Yes	Yes	Yes		No	No	Yes	Yes	Wisconsin produces a group travel planner. Circle Wisconsin, a private nonprofit marketing group, provides familiarization tours. We also work closely with the Wisconsin Association of Convention and Visitor Bureaus.
WY	Yes	Yes	Yes	Yes	350	Yes	Yes	Yes	Yes	
AS	Yes	Yes	No	No		No	No	No	No	Funding of the Agency operations yearly depends on local appropriations with the approval of both houses in the Legislature with final approval of the Governor. But we are still searching for the assistance of federal funding for development of tourism in the U.S. Territories.
GU	Yes	Yes	No	No		No	No	No	No	

State	Name of Public Relations or Press Information Officer	Percent of Publicity Directed Out-of-State	Name of Published Newsletter	Frequency Newsletter Published	Number of State Tours Given for Press or Travel Writers in 1988	Number of Press or Travel Writers Taken on These Tours in 1988
AL	Sara Redding Communications Supervisor	100%	Alabama Travelgram	Quarterly	4*	4
AK DOT	Patti Greene Information Officer	100%	Alaska Travel Today	Bi-monthly	19	110
AK ATMC	James Wright Marketing Coordinator	100%	Alaska Travel Today	Bi-monthly	20	100
AZ	Marjorie Magnusson Public Information Manager	60%	Arizona Directions	Quarterly	22	70
AR	Tyler Hardeman Editorial Director	60%	Arkansas: The Natural State News	Quarterly	4	45
CA	Fred Sater Media Relations Manager	60%	Insights	Biannually	3*	22
CO	Deborah Milo Director of Public Relations	85%	Board Bulletin	Monthly	4	50
CT	Barbara Beeching Public Information Officer	75%	ClassicConnecticut Travel Notes	3 Times Per Year	4*	17
DE	Gigi D. Windley Director of Tourism Marketing	85%	Tourism Industry News	Quarterly	15	25
DC	Thomas Murphy Tourism Promotion Manager	100%	Communicator	Bi-monthly	5	
FL	Sally Lane Domestic Public Relations Rosetta Land International Publicity	95%	None	N/A	4 (domestic)	50
GA	Hanna Ledford Deputy Commissioner for Tourism	10%	Tourism Talk...	Monthly	20-25	75
HI STO	Norman Reyes		None	N/A		
HI HVB	Marcie Carroll* Director of Communications	90%	Hawaiian Beat	Monthly	2	12
ID	Georgia Smith Public Information Officer	85%	Idaho Travel Council Newsletter	Bi-monthly	10	116
IL	Lynda Simon Deputy Director	50%	Tourism News	Quarterly		
IN	Flory Fleck Public Relations and Sports Promotion	80%	In Travel Notes	Monthly	1	23
IA	Kathy Bowermaster Marketing Manager	90%	Discovery	Quarterly	2	20
KS	Richard Epp Public Information Officer	20%	None	N/A	4	50

See "Press & Public Relations — Table 2" for explanatory notes

PRESS AND PUBLIC RELATIONS — TABLE 1

State	Name of Public Relations or Press Information Officer	Percent of Publicity Directed Out-of-State	Name of Published Newsletter	Frequency Newsletter Published	Number of State Tours Given for Press or Travel Writers in 1988	Number of Press or Travel Writers Taken on These Tours in 1988
KY	Jim Carroll Executive Staff Advisor	10%	Kentucky Tourism Federation newsletter* The Uncommon Denominator**	Quarterly Monthly	1	7
LA	Charley Fisher Jerel Giarrusso	100%	Travel Journal	Monthly	6	36
ME	Jim Thompson Information Officer	80%	Maine Tourism Review	Quarterly	25*	125
MD	Frank Kelly Information Officer	75%	Maryland Travelgram	Monthly	35	50
MA	Jonathan Hyde Director of Public Relations	85%	The Spirit Messenger	Bi-monthly	5	40
MI	Sue Wagner Director of Press and Legislative Unit	50%	Travel Michigan MI Insider	Monthly Quarterly		
MN	Bonnie Richter Manager of Advertising and Public Relations	40%	Minnesota Travel Minute	Every 3 weeks	15	150
MS	Vacant	95%	MS Tourism Update	Monthly	1	4
MO	Steve Kappler Public Information Officer	20%	Missouri Newsletter	Monthly	2	30
MT	Steve Shimek Publicity Coordinator	90%	Fresh Ideas	Quarterly	8	40
NE	Mary Emanuel Development Consultant	95%	Nebraska Economic Developments	Monthly	1	4
NV	Richard Moreno Public Information Officer	90%		Quarterly	5	25
NH	Ann Kennard OVT Publicity Film Bureau Director	75%	New Hampshire Travel Council Newsletter*	Monthly	5	20
NJ	Amy Collins Director, Public Information	N/A	Travelgram	Monthly	15	150
NM	Mike Pitel Travel Writer/Editor	90%	More*		4	36
NY	Bern Rotman Director, Bureau of Communications	+50%	Horizons	Bi-monthly	6	50
NC	David Little Communications Director	80%	North Carolina Travel Report	Quarterly	10-12	30+
ND	Tracy Potter Publications Coordinator	90%	Inside Tourism	10 Times Per Year	14	25
OH	Tim Moore Public Relations Manager	80%	The Buckeye Line	Quarterly	12	46
OK	Sandy Pantlik Media Coordinator	28%	Inside Oklahoma	Bi-monthly	6	38

See "Press & Public Relations -- Table 2" for explanatory notes

PRESS AND PUBLIC RELATIONS — TABLE I

State	Name of Public Relations or Press Information Officer	Percent of Publicity Directed Out-of-State	Name of Published Newsletter	Frequency Newsletter Published	Number of State Tours Given for Press or Travel Writers in 1988	Number of Press or Travel Writers Taken on These Tours in 1988
OR	David Hooper Public Information Officer	15%	Oregon Developments	Bi-monthly	3	25
PA	Sam Rogers Elkman Public Relations	85%	Travel Industry Newsletter	Bi-monthly	2	20
RI	Caren Corso Director of Public Relations	85%	Ocean Currents	Quarterly	22	60
SC	Cherie Mad Manager of National News & Information	40%	South Carolina Travel Talk	Quarterly	14	21
SD	Jan Clark, Editor Daria Bigler Public Relations	80%	Travel News	Monthly	None*	103
TN	Don Wick Director of Information Services	50-60%	Tennessee Tourism News	Bi-monthly	3	30
TX HWYS	Richard Roberts Editor Tourist Literature	N/A	Texas Travel Log	Monthly	N/A	N/A
TX TOUR	Michael Murphy Chief of Media Relations	75%	"Results"*	Monthly	10	68
UT	Joe Rutherford Public Relations Director	34%	Utah Traveler	Quarterly	3	29
VT	John Cashman Information Officer	90%	Vermont Traveler	Periodically	1	8
VA	Martha Steger Director of Public Relations	90%	Virginia	Bi-monthly	None*	57
WA	Tom Stitz Travel Media Specialist	50%	None*		9	20
WV	Cindy Harrington Public Relations Administrator	75-85%	None		4	35
WI	Gary Knowles Director, Bureau of Communications	N/A	Wisconsin, You're Among Friends	10 Times Per Year	5	50
WY	Elayne Mallis Public Relations Manager Linda Sauer Public Information Officer	80%	Travel Log	Monthly	6*	50
AS	John Pereira	85%	None		None	None
GU	Vacant	100%	Bisita Guam News	Bi-Monthly	32	110

See "Press & Public Relations — Table 2" for explanatory notes

PRESS AND PUBLIC RELATIONS — TABLE 2

State	Explanatory Notes
AL	*These were individual tours for individual writers. The exclusive goal of this bureau is the full and complete development of the state's tourism industry, so that Alabamians may realize the full potential of tourism's contribution to the state's economy.
AK DOT	The Division is currently involved in planning a celebration to be held in 1992 which will commemorate the 50th anniversary of the completion of the Alaska Highway.
CA	Office coordinates FAM tours for individual and group media upon request. *Because our office was technically closed for three months during the summer of 1988, we were forced to cancel four press trips we had scheduled for Fall 1988; our publicity efforts operate on a fiscal year.
CO	Research and itinerary planning assistance for writers and producers is also provided by the public relations department.
CT	*An additional 16 FAM tours were conducted. Normally, we recruit travel writers from the eastern half of the United States. An additional 8 writers were taken on individual tours. Tourism districts also host writers and broadcasters. In 1989, the National Society of Newspaper Columnists held its annual convention in CT. The state's contract tourism promotion agency in New York also publishes a newsletter.
DE	We bring in travel writers individually for the most part.
FL	Publicity sections are involved in media familiarization tours, media development missions, special sections and collateral productions and assistance which includes feature story production and itinerary development. Domestic Public Relations has recently evolved to handle industry activities such as the Annual Governor's Conference on Tourism and the Florida Columbus Hemispheric Commission, and also coordinate photography and audio/visual programs.
GA	We participate in, but do not sponsor, the Georgia Governor's Tourism Conference.
HI HVB	*1988 - Marcie Carroll; 1989 - Jan-May: Marcie Carroll; June-Nov: Lindy Boyea, Acting Director; November 17: Jon Fukuda, Vice President, Communications.
KY	*Our agency provides a section of the information in this newsletter, but we do not actually publish it. **Our agency publishes this newsletter monthly.
ME	*Maine does custom tours for scores of individual journalists through NEVSA. Organized group familiarization tours are conducted for travel agents, tour operators and meeting planners.
MD	Most of our current (1988) requests for travel information via slides, pictures, and travel features came from out-of-state media. We initiated an in-state program to attract in-state coverage.
MO	As budget allows, the Division of Tourism is expanding its press and public relations staff and services.
NH	*The newsletter is published by the New Hampshire Travel Council, of which we are a member. This office makes arrangements for groups to tour in cooperation with New England USA.
NM	*Tourism information is published in Economic Development and Tourism Department's newsletter, not in a separate tourism newsletter.
NY	We retain public relations firms in New York and London. An extensive collateral program is produced in-house. The Department issues frequent I LOVE NEW YORK press releases, highlighting current developments, programs and travel activity reports. Tours for individual writers are often arranged/conducted by regional offices on an informal basis.
NC	Publicity done in-state consists of PSA spots on TV and radio and news releases.
OH	A public relations program has been developed to support and maximize efforts of the major marketing campaign, "OHIO . . The Heart of It All". The PR plan developed includes media relations on an ongoing basis to television and radio stations regionally, nationally and internationally; and a travel writers program including scheduled familiarization tours, photography and travel feature story availability. Special promotional programs to enhance tourism and education linkage include the "follow the footsteps" and "Ohio by-lines" programs.
OK	Media support of department programs is continuing to expand. In addition to a successful N.S.C.A. program with the Oklahoma Association of Broadcasters, the department has implemented programs with the Oklahoma Association of Outdoor Advertisers and the Oklahoma Press Association, as well as a corporate logo program with the private sector. Feature stories and appropriate news releases are sent out on a weekly basis. FAM tours for regional, national and international travel writers are planned during 1989-90.
OR	We are in the process of assigning another staff person to public relations duties, mainly for out-of-state trade publications and national consumer media.
PA	Elkman Advertising also assists in public relations activity.
SD	*South Dakota has one-on-one hostings instead of group tours. A key effort of South Dakota tourism is hosting outdoor and travel writers, AAA counselors, tour operators; a new emphasis is being placed on conventions and film production companies.

State	Explanatory Notes
TN	In addition to standard news releases, the Tennessee Department of Tourist Development also produces a weekly camera-ready article concerning an area, attraction, city or event. These articles are designed primarily for newspaper use.
TX TOUR	*"Results" is not solely Tourism information. It is for all of the Department of Commerce.
VA	*The Division only does individually tailored itineraries for media, with the exception of some international media in groups (5 such tours in 1988.)
WA	*Space allotted for Tourism news in department-wide quarterly newsletter Team Washington, News. Emphasis on providing resource information; production and loan of photography; development and distribution of feature stories; creating press kits and designing itineraries for travel writers and consultation and facilitation with in-state tourism organizations and associations on the development of effective public relations activities.
WY	*Domestic familiarization tours equal 60% of total. International press tours equal 40%.

RESEARCH — TABLE 1

State	Staff Member Responsible for Travel Research	Is This His/Her Full-Time Responsibility?	Who Conducted the Following Research Studies Done in 1988-89 and (Associated Cost)?				Other Research
			Economic Impact	Advertising Effectiveness	Consumer Attitude/ Image/Awareness	Visitor Profile	
AL	Leigh Cross Account Clerk I	No	Davidson-Peterson Assoc. ($23,975)	Davidson-Peterson Assoc. ($23,975)			
AK DOT	Pete Carlson Development Specialist	No		Dittman Research Corp.* ($65,000)		Data Decisions Group ($764,000)**	No
AK ATMC	Bob Miller Executive Director	No		Dittman Research Corp.* ($65,000)		Data Decisions Group) ($764,000)**	No
AZ	Eileen Mahoney Research Manager	Yes	Northern Arizona University ($4,000)			Arizona State University ($53,000)	Yes*
AR	Charles McLemore Director of Research & Tourist Information Centers	No	In-house	In-house	Research firm ($110,000)		No
CA	Nan Lippitt Research Analyst Office of Economic Research, Commerce Dept.	No	Shullman Research (N/A)	TeleTech (N/A)	Keye-Donna-Pearlstein (N/A)	Shullman Research (N/A)	No
CO	Don Marrion Research Manager	Yes	USTDC ($7,500)		Longwoods Research Group, LTD ($160,000)*	Longwoods Research Group, LTD (*included)	Yes**
CT	Barnett Lanchever Director of Tourism	No	U. of Wisconsin, Parkside ($34,000)				Yes*
DE	Catherine Wheeler Director	No					Yes*
DC	Marie Levin Tibor Director	No				USTDC ($10,000)	No
FL	Barry Pitegoff Tourism Research Administrator	Yes	Market Facts ($50,000)*			Rife Market Research ($96,900)	No
GA	Hanna Ledford Deputy Commissioner	No	Davidson Peterson Assoc. ($26,495)	Pringle-Dixon-Pringle	Davidson Peterson Assoc. ($23,100)	Davidson Peterson Assoc. ($28,600)	No
HA STO	Greg Barbour Tourism Research & Planning Coordinator	Yes					Yes*
HA HVB	Joseph Collins VP, Market Research	Yes					Yes*
ID	Patty Bond Marketing Specialist	No		Correctional Industries ($5,000)	Marcept Consulting and Research ($8,500)		No
IL	Michael Bowling Research Economist	Yes	Dept. of Commerce & Community Affairs Division of Research		Market Facts, Inc. ($33,800)	National Planning Opinion, Inc. ($50,000)	Yes*
IN	Denise Miller Director	No	*	Bloomhurst, Story, O'Hara	Bloomhurst, Story, O'Hara	National Family Opinion	No
IA	Nancy Landess Marketing Manager	No	USTDC ($16,335)	Teleconnect ($7,910)		Welcome Centers	No
KS	Robert N. Salmon Director	No	In-house	Research firm ($15,000)*	Research firm (*included)	In-house	No

See "Research -- Table 2" for other research and explanatory notes

RESEARCH — TABLE 1

State	Staff Member Responsible for Travel Research	Is This His/Her Full-Time Responsibility?	Who Conducted the Following Research Studies Done in 1988-89 and (Associated Cost)?				Other Research
			Economic Impact	Advertising Effectiveness	Consumer Attitude/ Image/Awareness	Visitor Profile	
KY	James A. Carr Research Director	No	In-house	In-house			No
LA	Mark Northington Research Director	Yes	USTDC ($10,560)	In-house (N/A)			No
ME	Judy Berk Research Manager	No		Londy-Swardlick-Mackey ($6,185)	Londy-Swardlick-Mackey ($37,442)*	Londy-Swardlick-Mackey (*included)	Yes**
MD	Mereida Goodman Manager of Tourism Development	No	USTDC ($5,450)				No
MA	Mark McDermott Economic Program Planner	Yes	USTDC ($24,910)			USTDC ($24,300)	Yes*
MI	David Morris Research Manager	No		Insight Marketing, Inc. ($10,000)			No
MN	Ingmar Sollin Industrial Economist	Yes	USTLC ($13,750)	Office of Tourism ($6,500)	College/univereity ($2,500)	Office of Tourism ($10,000)	Yes*
MS	Director Research/Information Systems						
MO	Robert Main Administrative Manager	No		Ad agency	Research firm ($119,000)	Research firm ($32,000)	Yes*
MT	Sandra Hughes Travel Director	No	Institute for Tourism and Recreation	Institute for Tourism and Recreation			No
NE	Tom Doering Deputy Director, Research Division	No		In-house ($2,500)			No
NV	David Fitzpatrick Director of Marketing	No		Market Opinion Research ($32,000)			No
NH	None		Davidson-Peterson Assoc. ($150,000)		Davidson-Peterson Assoc.		Yes*
NJ	Tina Dabrow Project Specialist	No		FRC Research Corporation ($26,804)	Focus Group Attitudinal Research ($30,930)	USTDC ($16,400)	Yes*
NM	Pam Hansen Marketing Information Specialist	No					Yes*
NY	Craig Wakefield Tourism Marketing	Yes	Bureau of Business Research	Penn & Shoen Assoc.	Diversified Research, Inc.	National Family Opinion ($18,820)	Yes*
NC	None		Research firm ($7,700)	NC State Univ.			No
ND	Bonnie Barsness Research Specialist	No					No
OH	Gene Matheny Assistant Deputy Director	No	Research firm*	Research firm*	Research firm*	Research firm*	Yes**

See "Research — Table 2" for other research and explanatory notes

State	Staff Member Responsible for Travel Research	Is This His/Her Full-Time Responsibility?	Who Conducted the Following Research Studies Done in 1988-89 and (Associated Cost)?				Other Research
			Economic Impact	Advertising Effectiveness	Consumer Attitude/ Image/Awareness	Visitor Profile	
OK	Ruth Ann York Market Research Analyst	Yes	USTDC ($13,000)	ProMark ($37,800)	ProMark ($33,172)	In-house ($4,700)	Yes*
OR	Julie Curtis Assistant Director	No	Dean Runyan Associates ($13,500)	Oregon Tourism Institute ($8,000)*	Oregon Tourism Institute (*included)	Dean Runyan Associates ($18,000)	Yes**
PA	Elkman Advertising	No	USTDC ($14,300)	The Response Center ($23,000)			No
RI	John Lenna Director of Research	No	College/univ. ($20,000)	Research firm ($10,000)			No
SC	Peggy Smith Assistant Director	No	USTDC ($10,100)	USTDC ($68,000)			Yes*
SD	None		University of South Dakota ($11,000)	Lawrence & Schiller			No
TN	Peggy Harding Market Research Analyst	Yes	USTDC ($22,453)	Tourist Department; Academic Consultant ($15,290)	Ad agency ($56,500)	Welcome Centers ($8,300)	Yes*
TX HWYS	Milton Merhavy Director, Travel Services Section	No				In-house	No
TX TOUR	Edward McWilliams Research Specialist Director	No	USTDC ($30,000)	Texas Dept. of Commerce	Lance Tarrance & Associates ($100,000)	Highway Dept.	Yes*
UT	None						
VT	George Donovan Research Analyst	No		Tuckaway Tele-marketing ($3,700)			No
VA	David W. Sheatsley Research Manager	Yes	USTDC ($28,000)	USTDC ($22,000)	Southeastern Inst. of Research ($15,000)	VA Polytechnic Inst. & state univ. ($10,000)	Yes*
WA	David Tanner Research Analyst	Yes		Gilmore Research ($2,000*)			Yes**
WV	None		Research firm; college/univ.	Research firm; ad agency	Research firm; college/univ; ad agency	Research firm; college/univ.; ad agency	Yes
WI	Winfield MacDonald Director, Bureau of Marketing	No	In-house ($30,000)*	In-house (*included)			No
WY	Gene Bryan Director	No			Message Factors Inc. ($26,000)		Yes*
AS	None						No
GU	Doris C. Ada Tourism Industry Relations Officer	Yes					Yes*

See "Research -- Table 2" for other research and explanatory notes

RESEARCH — TABLE 2

State	Description of Ongoing Travel Data Gathering Projects	Major Problem(s) Facing Tourism Development in the State	Does State Have a Travel Development Plan and/or Policy Statement?	Additional Comments
AL	Lodgings tax revenue tracked on a monthly basis, and the eight state welcome centers keep monthly traffic and reservation totals.	Complicated motorcoach registration and enforcement process discourages group travel bookings. Need aggressive recruitment of tourism developers.	No	
AK DOT	An on-going Visitor Statistics Program provides continuous data on visitor volumes, arrival modes, demographics, expenditures, opinions, and purpose of travel. This research is supplemented by media advertising conversion studies, geographic response analysis, market segmentation research, and collateral effectiveness research.	High transportation costs, competition from foreign destinations caused by favorable exchange rates, misperceptions concerning Alaska as a destination with broad appeal.		*Joint DOT and ATMC project. **Joint DOT and ATMC three year project.
AZ	Report covers number of tourists coming to Arizona on a quarterly basis and their expenditures. Monthly report on "bed tax" collections by cities and state. Monthly report on airport arrivals and visitors to major national parks. Undertaking new study to evaluate impact associated with out-of state travelers and tourists coming to Arizona. Data base for study will be completed in December 1989.	None	No	*Arizona Hotel/Motel Survey, Kenneth Leventhal & Company, ($25,000)
AR	Tourist Information Center (TIC) Survey of every 25th travel party registered at each TIC. Monthly summary of advertising inquiries.	Education of the people in general to the economic importance of tourism in relation to the smokestack industries.		
CA	A number of travel-related indicators are monitored including airport arrivals, vehicle traffic, camping activity, hotel occupancy rates, inquiries and travel-related construction.	None	Yes*	*California Tourism Policy Act Annual marketing plans
CO	Detailed trip characteristics gathered at welcome centers. Visitation figures monitored at national parks, recreation areas, monuments, state-owned museums, and major trade associations. Tourism tax revenues tracked on monthly basis. Visitation and expenditure data are collected quarterly (beginning in FY 1989); inquiry analysis is ongoing; attendance barometer published for summer quarter; ad tracking of awareness campaigns; advertising concept testing.	Increased competition from other states. Slowdown in the national economy.	Yes	*Visitor profile data was included with consumer awareness, attitude, and image data in each study. One study was conducted for the summer market and one for the winter market. **Tourism Visitation and Marketing Tracking Study, MPO Research, Inc.
CT	We keep a count of visitor volume at our welcome centers, both hourly and by category of questions asked. We are also surveying leading vacation destinations. We keep records of WATS line calls. Attendance Barometer samples 35 key indicators. Lotus used for determining comparisons with earlier years.	Cuts in state tourism budget.	Yes	*Barometer Sampler with college interns. We keep a tally of inquiries on our 2 WATS-line numbers and conduct a conversion study of mail and phone inquiries to actual visits.
DE	Travel Barometer; Group Tour Preparedness and Interest Survey of Industry In-state; database collecting.	Splintered, factionalized travel industry; balance of tourism growth and environmental concerns, especially in resort areas; inadequate labor supply; small tax base.	No**	*Travel Barometer, University of Delaware ($10,000) **FY90 Tourism Development and Marketing Master Plan being done by Price Waterhouse.
DC	Limited research with the US Travel Data Center to determine the number of travelers coming to D.C.		No	

State	Description of Ongoing Travel Data Gathering Projects	Major Problem(s) Facing Tourism Development in the State	Does State Have a Travel Development Plan and/or Policy Statement?	Additional Comments
FL	Our ongoing travel research monitors the magnitude and characteristics of Florida's visitors. We also commission special marketing research studies which explore ways to increase Florida's tourism.	Developing new origin markets.	Yes	*The Visit Friends and Relative Component of Florida Tourism, Group Leisure Market ($45,000) and Lodging Choice Segmentation ($50,000). Exit Survey Project Review MOT of America ($35,000) Canadian Advertising Effectiveness - Soluwar, Bureau de Recherche, Montreal ($45,000); Television Commercial Pre-test McCollum/Spielman Co. ($68,550)
GA	We monitor welcome center visits, traffic counts at selected stations, attraction attendance, travel industry sales receipts and tax revenues generated by travel.	Budgetary limitations with regard to visitor information center maintenance, advertising, tour development & field representatives.	Yes	
HI STO	Tourism Impact Management System: Includes collection of survey data, position papers from interest groups, and content analysis of relevant printed material. Purpose is to more systematically ascertain perceived impacts of tourism development in order to provide guidance for future planning and policy formation.	See Hawaii — HVB response	Yes	In 1987-88 Hawaii initiated a strategic-planning process for tourism which aims to provide more proactive guidance for the state's tourism marketing efforts. It is intended to complement the state's functional planning process for tourism which also addresses physical development, employment and career development, and community relations. The STO is currently working with a consultant to update our Tourism Strategic Plan. *Competitive Destination Study, Arthur Young International ($75,000)
HI HVB	Basic Data Surveys: inflight passenger information forms distributed to incoming passengers from USA, Canada and Japan. Visitor Opinion Surveys: mail out questionnaires soliciting satisfaction information, socio-economic profile and trip planning data of American & Japanese visitors.	Reconciling need for additional employment & economic opportunity in Hawaii with local residents' desires & aspirations concerning lifestyle/quality of life in Hawaii. Also, problems exist related to the impact of energy supplies and cost on distant price-sensitive markets.		
ID	Interest/demographic segmentation; travel expenditure data/travel and decision making/travel origin/economic impact.	Non-competitive funding levels and lack of awareness of tourism as a legitimate industry.	Yes	
IL	Expenditure & origin/destination studies, advertising effectiveness studies, surveys at welcome centers, selected major conventions and trade shows and multilingual interviews at O'Hare Intl. Airport; hotel/motel tax receipts; economic profiles; development of a computerized data base for new research information.			*Tourism Brochures Study, Dept. of Leisure Studies, University of Illinois ($15,800)
IN	Committee of Research Gatherers	Availability of financing for feasibility studies, market research, and infrastructure needs of development projects.		*Conducted every other year. Next study planned for 1990.
IA	Interview surveys are conducted at information centers asking for origin, destination, party size, spending, etc. An attendance barometer of selected attractions is compiled.	Market research indicates Iowa has no image in the tourism marketplace. No state aid is available. There is a lack of adequate private funding sources.	Yes	
KS	We conduct surveys at Welcome Centers and survey the results of out-of-state advertising campaigns. Each "Linger Longer" packet contains a questionnaire.	Lack of adequate, ongoing funding.	Yes	We will be conducting a comprehensive market research study in FY90-91.

State	Description of Ongoing Travel Data Gathering Projects	Major Problem(s) Facing Tourism Development in the State	Does State Have a Travel Development Plan and/or Policy Statement?	Additional Comments
KY	Field survey of travel businesses; toll-free telephone system; mail information system; follow-up interviews with respondents to advertising; travel barometer (monthly and quarterly) of sample of travel businesses; and local marketing/economic impact studies.	Lack of capital for use in underdeveloped areas of the state.	Yes	
LA	We conduct visitor surveys and visitor counts at information centers. We monitor results of our advertising efforts. We conduct a travel barometer by season and maintain a data base on visitation.	Continuing problem of maintaining fiscal survival in the wake of dwindling state revenues.	Yes	We are currently conducting a Travel Profile Study with USTDC, and an in-house Welcome Center Master Plan.
ME	Economic impact data is collected quarterly on both state and sub-state levels. Advertising conversion and effectiveness studies are also conducted.	Major focus will be on establishing Regional Tourism Councils. In some areas of the state, new products need to be developed or existing products upgraded to meet anticipated demand.	No	**Tourism Indicators is prepared in-house.
MD	N/A	Lack of education on the part of the private sector and the legislature as to the importance and value of tourism to the economy of the state. Tourism is not a legislative priority, although more funds were received this year than ever before.	No	*The Office of Tourism Development uses the Department of Economic & Employment Development's Office of Research for travel research projects.
MA	We conduct three seasonal barometers each year collecting visitor/traffic counts from selected attractions/sources and comparing numbers on an annual basis.	Need to spread growth of tourism's benefits to all areas of state. Need to support shorter season/winter business. Need to keep balance between development/environment in relation to tourism growth. Unpredictable source of funding for state tourism agency.	No	*Conversion Study of Guidebook Users. GTE Travel Enterprises
MI	Michigan Travel Activity Monitoring System - ongoing data collection and analysis of secondary travel activity indicators. Continuing analysis of inquiries for travel information.	Competition from other states and Canada.		*Travel Activity Monitoring System conducted by the Travel, Tourism and Resource Center at Michigan State University.
MN	Quarterly and annual sales at lodging places (from MN Dept. of Revenue) and city lodgings tax receipts for communities which impose this tax.	Capital needs for small business, as well as more sophisticated marketing resources and advertising programs at the local and regional level.	Yes	*Pleasure Travel Traking Study, NFO Research, Inc. ($18,900) in collaboration with other states. Controlled studies: Tourism Development Potential for Interstate 90 Corridor, Davidson-Peterson Assoc.; Marketing and Promotional Opportunities for Outdoor Winter Travel in MN, Peat, Marwick, Main and Co.
MS	Response survey contained in calendar of events. Welcome Center registrations forms include space for demographic information. Subscribe to SEA report.	Insufficient adv/promotional funds. Lack of first-class destinations including resorts. Lack of leadership in industry and among local elected officials.	No	Major research project currently in progress consisting of four components: 1) growth model; 2)non-visitor study; 3) conversion study; 4) economic impact study.
MO	We survey travel parties visiting our welcome centers. This is done on forms which can be read by computer, and printouts are generated monthly.	The Division of Tourism's budget, although increasing, continues to lag behind the national average for state travel offices. A more competitive budget remains our primary need.		*A Travel Barometer was compiled by the advertising agency for $13,000.
MT	Data is collected through attendance barometers, airline arrivals, advertising inquiries, highway traffic counts, and tax reviews.	Lack of market awareness, lack of low-cost transportation, distance from major population centers.	Yes	Beginning in 1987 the state legislature mandated as part of a new 4% accommodations tax that a tourism research institute be established at the University of Montana. The institute receives 2.5% of the total tax collections annually or approximately $125,000 per year. The Institute Director is: Steve McCool, Institute for Tourism Research, U. of MT, Missoula, MT 59812.

State	Description of Ongoing Travel Data Gathering Projects	Major Problem(s) Facing Tourism Development in the State	Does State Have a Travel Development Plan and/or Policy Statement?	Additional Comments
NE	Attraction attendance figures are compiled annually and monthly during the summer for selected representative sites. Monthly highway traffic counts are obtained, as are state and county lodging tax revenues. Every six months, analyses are undertaken of the origins and generators of requests for travel information. Occupancy rates are gathered during the summer each month from a sample of Nebraska hotels and motels, and data is gathered biennially for the Nebraska Hotel-Motel Directory.	Lack of awareness of Nebraska attractions and events among both residents and non-residents, and failure of the public to recognize the importance of travel and tourism in economic development.	No	
NV	One research of Las Vegas Convention Authority, Reno Convention Authority and other state departments.	More competition in gaming and tourism in general.	Yes	
NH	Motor vehicle counts are conducted by the Department of Transportation. Visitor volume is counted at White Mts. Visitors Center in Lincoln/North Woodstock, only. Visitor origin is reported by Chambers of Commerce visitor information booths. In addition, expenditure and origin/destination surveys have been developed for an ongoing survey program. We keep track of mail and telephone requests for vacation literature. A permanent research program, Travel Research and Statistical Services, has been instituted with the U. of NH.	Lack of mass transportation. NH is an auto-dependent state. Long-range planning of effects of development on coastal and lakefront properties, adequate infrastructure to handle increased number of cars. Lack of help and lack of affordable housing for help.	Yes	*Park Visitor Surveys, TRASS
NJ	Motor vehicle counts are acquired from the roadway authorities when necessary. Other efforts are in the initial stage. Department of Taxation receipts. Count of tourists at Welcome Centers.	Educating the public about pollution issues that affect the NJ seashore.	Yes	*Summer Visitor and Economic Impact of Tourism at the NJ Shore, USTDC ($33,000). The division is working closely with the Dept's of Environmental Protection, Agriculture, Health & Transportation to educate and inform visitors so they can better enjoy NJ seashore vacations.
NM	Counts are made of traffic on selected highways; out of state passenger cars, visitors to national and state parks and monuments, selected attractions and welcome centers.	Lack of coordination and communication between and among industry groups and planning entities.	Yes	*Conversion study conducted by Tourism Division and University. Monthly reports are made by mail and phone inquiries. These are broken down by ad or travel story which stimulated the inquiry.
NY	A "Travel Activity Index" composed of VMT, thruway traffic, hotel/motel occupancy, etc, is compiled by Division of Research & Statistics. Other research includes annual Advertising Effectiveness/Market Share Survey; seasonal surveys of travel industry aspects; annual hotel occupancy; Summer occupancy and attendance surveys (Upstate Summer Travel Activity Index); Monthly Tourism Activity Data Base; Quarterly Pleasure Travel Analyses.	Fragmented industry, competition from other travel destinations, high cost of capital (interest rates), inadequate staff levels, lack of interindustry/interregional coordination and cooperation, inability to adjust to changes in consumer markets and tastes, declines in promotion efforts, labor shortages.	Yes	*Special industry and regional analyses are conducted in-house. Slowly, travel and tourism development has begun to become an accepted component of economic development, but more work (education) needs to be done.
NC	None	The public is not fully aware of the economic impact of tourism on the state.	Yes	
ND	None	Lack of available capital to develop many of the tourism-related areas of the state.	No	
OH	For 1988 the Ohio study measured the full 12 month results and effect of recreational travel and compared the results to the prior benchmark study.	An adequate economic impact formula or formulas that can be used by a diverse private sector and which deletes airline receipts. Until the problem of measuring economic impact is resolved, both states and private sector will continue to be challenged regarding the credibility of results. Legislative allocation for tourism marketing that is commensurate with public demand for information and with aggressive competition with other states within the region.	No	*All part of $45,550 research total. **Minority Travel Profile Study, ad agency ($16,000)

RESEARCH — TABLE 2

State	Description of Ongoing Travel Data Gathering Projects	Major Problem(s) Facing Tourism Development in the State	Does State Have a Travel Development Plan and/or Policy Statement?	Additional Comments
OK	A systematic sample survey is taken by the attendants at our Information Centers of all visitors. A follow-up survey is taken of a sample of the completed questionnaires. A fulfillment survey is conducted quarterly of all inquiries to our Literature Distribution Center (LDC). Annual studies include the Pre/Post study of our advertising plus the annual conversion study of inquiries made at LDC. We maintain a monthly Travel Barometer of selected attractions in the state. We also conduct periodic surveys of the participants on our familiarization tours and attendees at travel/trade shows.	The need for a clear state vacation image; lack of a major travel destination; limited development of western heritage/Native American attractions and lakefront services.	Yes**	*Follow-up Survey, In-house ($7,078) **We have an annual marketing plan.
OR	Major research is contracted with research firms, on an RFP basis; in-house Travel News newsletter is published twice a year.	Infrastructure development - highways, facilities development, etc. Also more packaging needed.	Yes	**Tourism Inventory, Dean Runyan Assoc. ($10,000); Wage and Income Study, Dean Runyan Assoc. ($7,500)
PA	Fulfillment agency provides ongoing services and reports.	Lack of funding program for development of quality attractions. Also, lack of funding for rural tourism.	Yes	
RI	Cooperative continuing travel research study with University of Rhode Island. Monitoring economic impact of tourism in general and specific events, forecasting economic impact of special events. Attendance at major attractions, bridge and airport traffic, and Information Center surveys are compiled.	Labor shortage.	Yes	
SC	Economic impact, visitor profile, accommodation tax and lodging industry tracking, advertising conversion studies, industry barometer, welcome center traffic, industry investment, development and job creation.	Highway access to coast. Competition from other destinations.	No	*Prizm Study, Leslie Advertising ($15,000); SC Lodging Trends Survey, in-house ($36,000, partially off-set by private co. and subscription sales.)
SD	Ongoing analyses of business volume, visitation, and economic impact of travel spending and employment.	Distance from major markets. Seasonality of business. Lack of destination resorts	No	
TN	Conduct economic impact and conversion studies. Monitor taxes and sales for travel industry, state and national park attendance, airline activity, hotel occupancy rate, highway traffic counts, and attractions attendance. Develop visitor profile from random sampling of Welcome Center registration, track vehicle counts and hotel/motel reservations. Analyze responses to toll-free numbers and Welcome Center registration for most active media markets.	Educating community leaders and all levels of elected officials that tourism is economic development as much as manufacturing or industry, is an ongoing and necessary objective of this department. Our goal is to create an understanding of the importance of maintaining an advertising budget which keeps Tennessee competitive with other southeastern states.	Yes	*Travel to Nine Selected TN Cities and To & Through TN, 1989, USTDC ($30,000). A study to determine the influence of advertising on selection of TN as a travel destination and demographic/trip characteristics of travelers to and through TN and to 9 selected cities is being conducted for calendar year 1989.
TX HWYS	The Travel and Information Division conducts a survey of auto visitors, monitors traffic counts, and maintains tourist bureau visitor counts. The Auto Visitor Survey is compiled from survey cards which are distributed to visitors to the Texas Tourist Bureaus.		Yes	The State of Texas completed a Strategic Travel & Tourism Plan in December of 1988. This plan was developed by 7 state agencies: Travel & Information Div. of Dept. of Hgwys & Public Trans.; Tourism Div. of Dept. of Commerce; Texas Parks and Wildlife Dept.; Texas Historical Comm.; Texas Dept. of Agriculture; Texas Dept. of Public Safety and the Recreation & Parks Dept. of Texas A&M Univ. A formal mission was adopted: "The travel and tourism mission of the State of Texas is to provide promotional, informational educational and developmental programs, services and facilities, designed to maintain and increase Texas' standing as a premier U.S. and international destination, to fulfill and enrich travelers' experiences within the state, and to sustain

State	Description of Ongoing Travel Data Gathering Projects	Major Problem(s) Facing Tourism Development in the State	Does State Have a Travel Development Plan and/or Policy Statement?	Additional Comments
TX HWYS	Continued...			travel and tourism as a major contributor and catalyst for state economic development while protecting distinctive Texan lifestyles, cultures and environments."
TX TOUR	See Texas State Highways Dept. response. Conduct an annual city room occupancy tax survey, and periodic conversion studies. Will begin reporting quarterly indicators from secondary sources in 1990. Quarterly reports on Texas Lodging Industry Supply/Demand, Revenues and Taxes in 30 MSA's. Biennual conversion studies.	Lack of investment capital	Yes	*Economic Impact of Motorcoach Tours to Texas, S.E.A. ($2,000); 6 Focus Groups, several research firms ($45,000); City Hotel Occupancy Use Study, Intra-State Agency; National Pleasure Travel Traking, N.F.O. Research Firm ($20,000); Qtr. Report of 30 Texas MSA's Lodging Statistics, Marketshare, Inc. ($7,500); Three Year Research Plan and Literature Review, Independent Research ($20,000). We need a better understanding of the air and auto traveler to Texas, both in-state and out, as well as both domestic and international travelers.
UT	None	Infrastructure, hospitality, and funds for promotion.	Yes	
VT	We do a monthly survey of travel businesses as well as regularly monitoring traffic counts, gas & liquor sales, recreation, room and meal taxes.	State growth plan enacted, but not implemented; needs economic development phase, now in final report stages; negative attitude toward industry by vocal minority; greater awareness of Vermont as a destination.	Yes	
VA	We monitor visitor volume at welcome centers & conduct travel data projects to obtain periodic visitor surveys, business receipts & several others. Monthly barometer: monthly attendance is gathered from 165 reporting stations across the state.	Increased competition from other destinations.	Yes	*Slogan Awareness Study, R.H. Bruskin Associates ($3,000). Work continues to extend plan into long-range development.
WA	Inquiries breakdown, VIC traffic counts, attractions attendance, highway traffic counts, border crossings, ferry traffic, airport arrivals, state & national park attendance, accommodations inventory, gross business receipts, taxation, revenue and employment data at regional and county level, occupancy rates and ski lift days.	Lack of designated state promotion funds and underdeveloped tourism plant; lack of long-term, sustained commitment to comprehensive development program, lack of recognition of economic impact of tourism and role of state in tourism promotion and development.	Yes	*Cost shared 50-50 with another marketing partner. **The Tourism Industry Assessment Committee was established by the Department of Trade and Economic Development to obtain a better understanding of the size and importance of the tourism industry, its potential for the state's economy, the opportunities and constraints affecting tourism development in the state and the role of the public and private sector in the industry's development. The Committee employed the services of Price Waterhouse ($150,000) to assist in its investigation.
WV	Compile tourist data through traffic counts and registration at information centers. In-house data gathering of ski resort and whitewater industry attendance, demographics, etc..	Image and funding.	Yes	
WI	Informal telephone surveying of selected businesses.	Alleged pollutants to game fish, Indian Treaty rights issues, and Lyme tick disease.	Yes	
WY	Attendance figures at national parks, monuments and historic sites; attendance figures at major attractions, ie., Cheyenne Frontier Days, Buffalo Bill Historical Center; state information center visitor counts; and highway traffic counts.	General lack of public ground transportation networks; shortness of season; and lack of low-interest, long-term loans for facilities.	Yes	*Focus group research, McGladrey, Pullen, Inc. ($20,000).

RESEARCH — TABLE 2

State	Description of Ongoing Travel Data Gathering Projects	Major Problem(s) Facing Tourism Development in the State	Does State Have a Travel Development Plan and/or Policy Statement?	Additional Comments
AS	Arrival Statistics (Air & Sea)	The distance between source markets and limitation of accommodation available. Obtaining funding to support a 3-5 year development plan. A thriving Samoan infrastructure will create new jobs and industries, and reduce the nation's dependence on U.S. government subsidies.	No	Critical problem areas are general conditions, lack of employee training, poor employee attitudes, and overall state of tourism facilities and programs.
GU	Monthly visitor arrival data which is derived from customs forms collected from each arriving passenger. GVB is also ready to produce an Annual Statistical Report-1988 which covers critical aspects of the visitor industry performance through the calendar year.	hotel room shortage, airport facility expansion, labor shortage, lack of tourist amenities (activities, night life entertainment, etc.)	Yes	*Public Awareness Program, Visitor Industry Education Council ($50,000)

State	Number of Welcome Centers in State	Number Operated Year-Round	Average Number of Employees per Welcome Center	**Welcome Centers Receiving Travel Office Funding**			(Other) Sources of Funding for State Welcome Centers
				Number of Centers?	What are Funds Allocated For[1]?	Percent of Total Operation Cost[2]	
AL	8	8	5 full-time	8	E,F,G,H	20%	highway/transportation dept.
AK DOT	5	5	1 full-time 4 part-time	1	F,G	100%	
AZ	1*	1	3 full-time	1	A,D,E,F,G,H	100%	
AR	12	12	3 full-time	12	D,E,F,G,H	N/A	highway/transportation dept.
CA	None*						
CO	4	4	1 full-time 40-60 part-time	4	C,D,E,F,G,H	100%	city/county government(s)* chamber(s) of commerce*
CT	13	9	2 part-time	13	A,B,D,F,G,H	50%	highway/transportation dept. convention/visitors bureau(s)
DE	5	5	N/A	None	H*	None	highway/transportation dept. other state agencies city/county government(s) chamber(s) of commerce convention/visitors bureau(s) private organizations
DC	1	1	N/A			* 100%	
FL	5	5	9 full-time 2 part-time	5	A,B,C,D,E,F,G	100%	highway/transportation dept.*
GA	11	11	8 full-time 3 part-time	11	B,C,E,F	100%	None
HI STO	None						
ID	1	None	full-time 2 part-time	None		None	highway/transportation dept. Parks & Recreation Dept.
IL	11	1	3 full-time	11	F,G,H	100%	highway/transportation dept.
IN	3	3	3 full-time	3	F,G,H	N/A	highway/transportation dept.
IA	17	10	2 part-time	17	A,B,C,D,E,F,G	N/A	highway/transportation dept. city/county government(s) chamber(s) of commerce convention/visitors bureau(s) private organizations
KS	7	5	4 full-time 2 part-time	7*	B,C,D,E,F,G,H	100%*	highway/transportation dept. city/county government(s) chamber(s) of commerce convention/visitors bureau(s) private organizations
KY	11	8	3 full-time 2 part-time (state-operated centers only)	6	B,D,F,G,H	20%	highway/transportation dept. chamber(s) of commerce convention/visitors bureau(s)

See "Welcome Centers -- Table 2" for explanatory notes

[1]A = Construction
B = Renovation/Major Repair
C = Property Maintenance/Upkeep
D = Internal Furnishing
E = Internal Maintenance/Upkeep
F = Staffing
G = Staff Training
H = Travel Literature/Brochures

[2]Share of the total cost to operate highway welcome centers which is paid by the travel office

WELCOME CENTERS — TABLE 1

State	Number of Welcome Centers in State	Number Operated Year-Round	Average Number of Employees per Welcome Center	**Welcome Centers Receiving Travel Office Funding**			(Other) Sources of Funding for State Welcome Centers
				Number of Centers?	What are Funds Allocated For[1]?	Percent of Total Operation Cost[2]	
LA	10	10	3 full-time 5 part-time	10	A,B,C,D,E,F,G,H	100%	
ME	4	4	5 full-time 4 part-time	4*	F,G	62%	highway/transportation dept. chamber(s) of commerce convention/visitors bureau(s) private organizations
MD	10	10	2 full-time 2-5 part-time	10*	B,C,D,E,F,G,H	100%**	
MA	6	6	N/A	2	E,F,H	10%	highway/transportation dept. city/county government(s) chamber(s) of commerce convention/visitors bureau(s) private organizations
MI	13	13	3 full-time 5 part-time	None		None	highway/transportation dept.
MN	10	8	1 full-time 4 part-time	10	D,F,G,H	100%*	highway/transportation dept.
MS	10	10	3 full-time	9	D,E,F,G,H	95%	highway/transportation dept. chamber(s) of commerce private organizations
MO	7	7	3 full-time 5 part-time	7	C,D,E,F,G,H	100%	highway/transportation dept.
MT	N/A						
NE	26	None	1 full-time 1 part-time	None	F,G,H	None	highway/transportation dept.
NV	1	1	2 full-time	None	H	5%	highway/transportation dept. chamber(s) of commerce private organizations
NH	16	12	3 full-time	None	H	None	highway/transportation dept.
NJ	13	10	2 full-time 1 part-time	13	B,D,E,F,G		highway/transportation dept. chamber(s) of commerce private organizations NJ Airports Port Authority
NM	7	7	1.5 full-time 2 part-time	7	D,E,F,G,H	100%	highway/transportation dept.
NY	92*	48	1.1 full-time 3.6 part-time	None	H	N/A**	highway/transportation dept. city/county government(s) chamber(s) of commerce convention/visitors bureau(s) private organizations
NC	8	8	5 full-time 2 part-time	8	A,B,D,E,F,G,H	100%	highway/transportation dept.
ND	4	None	4 part-time	4	D,E,F,G,H	100%	highway/transportation dept.
OH	20	11	3 full-time 1 part-time	None	G,H	None	highway/transportation dept.*

See "Welcome Centers -- Table 2" for explanatory notes

[1] A = Construction
B = Renovation/Major Repair
C = Property Maintenance/Upkeep
D = Internal Furnishing
E = Internal Maintenance/Upkeep
F = Staffing
G = Staff Training
H = Travel Literature/Brochures

[2] Share of the total cost to operate highway welcome centers which is paid by the travel office

WELCOME CENTERS — TABLE 1

State	Number of Welcome Centers in State	Number Operated Year-Round	Average Number of Employees per Welcome Center	**Welcome Centers Receiving Travel Office Funding**			(Other) Sources of Funding for State Welcome Centers
				Number of Centers?	What are Funds Allocated For[1]?	Percent of Total Operation Cost[2]	
OK	9	9	3 full-time 2 part-time	9	A,B,C,D,E,F,G,H	100%	highway/transportation dept.
OR	10	1	2 full-time 1 part-time	10	A,B,C,D,E,F,G,H	100%	chamber(s) of commerce*
PA	10	10	3 full-time	None	H	None	highway/transportation dept.
RI	5	2	N/A	1	C,D,E,F,G,H	100%	Dept. of Environmental Mgmt. chamber(s) of commerce convention/visitors bureau(s)
SC	10	10	4 full-time	10	D,E,F,G	50%	highway/transportation dept.
SD	12	None	3 part-time	12	F,G,H	50%	highway/transportation dept.
TN	10	10	9 full-time	10	C,D,E,F,G	100%	highway/transportation dept.
TX HWYS	12	12	4 full-time 1 part-time	12	B,C,D,E,F,G,H	100%	highway/transportation dept.*
UT	8	5	15 full-time 3 part-time	8	C,D,E,F,G,H	70%	highway/transportation dept. regional offices
VT	5	3	3 full-time	5	C,D,E,F,G,H	10%	highway/transportation dept. chamber(s) of commerce private organizations
VA	10	10	4 full-time 2 part-time	10	C,D,E,F,G	100%	
WA	9	2	1-2 full-time 1-2 part-time	9*	C**,F,G,H	Varies	highway/transportation dept. city/county government(s) chamber(s) of commerce convention/visitors bureau(s)
WV	8	8	2 full-time 1 part-time	8	D,F,G,H	100%	highway/transportation dept.
WI	7	6	2 full-time 4 part-time	9*	F,G,H	N/A	
WY	7	4	2 full-time 3 part-time	7	A,C,D,E,F,G,H	75%	highway/transporation dept. state government
AS	None						
GU	None						

See "Welcome Centers -- Table 2" for explanatory notes

[1]A = Construction
B = Renovation/Major Repair
C = Property Maintenance/Upkeep
D = Internal Furnishing
E = Internal Maintenance/Upkeep
F = Staffing
G = Staff Training
H = Travel Literature/Brochures

[2]Share of the total cost to operate highway welcome centers which is paid by the travel office

WELCOME CENTERS — TABLE 2

State	Visitor Volume in 1988 at All Welcome Centers	How is the Visitor Volume Figure Obtained? Explanatory Notes
AL	2,060,351	The visitor figure is obtained through sign-in register at welcome centers. There are expansion plans at the Madrid Welcome Center. There are also welcome centers that are not state funded at the following locations : Mobile-Ft. Conde, Birmingham (2), Huntsville, Montgomery, Selma, Tuscaloosa, Dothan, & Gulf Shores.
AK DOT	91,038	Highway arrivals provided by U.S. Customs at Alcan and Taylor Highways. Ref: "Alaska Visitor Arrivals, Summer 1988 - AVSP"
AZ	N/A	*The first Arizona Welcome Center will be opened during the first quarter of 1990. The Welcome Center will be placed in an existing Arizona Department of Transportation rest area near the Arizona-New Mexico state line.
AR	962,734	The visitor figure is based on visitors who have contact with welcome center staff. Only those visitors who give their state of origin and destination, travel party size and number of days spent in Arkansas are counted.
CA		*California has no state-operated highway welcome centers. There are 14 highway agricultural inspection stations operated by the state's Department of Food and Agriculture, which record vehicle counts.
CO	419,883	The visitor figure is obtained from guest register sign-up at in each center. Travel counselors ask each visitor to sign register as they walk in. The master plan calls for 8 centers; currently there are 4 with 5th in development. The remaining 3 would be built or developed by a group of local/county/regional/private entities who would then let the Colorado Tourism Board operate them as welcome centers, including maintenance and staffing expenses. Other visitor centers in the state do not receive state monies. They are developed and operated by local/county/regional/private entities to promote local areas. *These sources provide funding for local visitor centers only, not for state operated Welcome Centers.
CT	770,504*	*The visitor figure represents summer only and is obtained through the use of hand-held counters by Welcome Center staff. All centers undergoing renovation and upgrading. Year-round New York entry gateway center planned. Long range: year-round operation of centers equipped with heat. New center planned on I-91 southbound gateway at Massachusetts border.
DE	N/A	*We supply literature, not funds for literature. **All welcome centers are separately run. One by the Dept. of Transportation, one by Delaware River and Bay Authority, and the rest by private sector organizations. There is no central system of visitor centers. Travel office funds for welcome centers are allocated through matching and direct grants. Other state agencies also provide funding for welcome centers in the state.
DC		We operate one Visitor Information Center in downtown Washington, D.C.
FL	3.0 million	Each visitor is counted as they enter the Welcome Center. Plans are to build a new facility on I-10 Pensacola which will be 90 percent federal funds, a $3.4 million dollar project. *The Department of Transportation maintains the interstate welcome centers' restrooms and grounds.
GA	15,142,540	This figure is determined by the number of visitors that register at welcome centers and the actual car counter.
ID	Unknown*	*The center on I-84 at the Idaho-Oregon border opened in May 1988. Three more welcome centers are planned to be completed by 1990 (built by Transportation - staffed by Parks and Recreation).
IL		Travel counselors keep statistics on all visitors.
IN	Unknown	Welcome centers were opened in the fall of 1988. There are 54 rest areas operated by the Indiana Department of Highways and private sector. We have no compilation of total visitors.
IA	394,458	Signatures in guest books are counted (at eight interstate centers only) and the average travel party size is applied to total signatures.
KS	832,000	The visitor figure is obtained through welcome center staff records and traffic counts. *The Travel and Tourism Division provides 100% funding for the 4 state-owned centers. It also provides about 10% of operating costs for the remaining 3 state-subsidized centers.

State	Visitor Volume In 1988 at All Welcome Centers	How is the Visitor Volume Figure Obtained? Explanatory Notes
KY	1,066,250	The visitor figure is obtained from registrations at the welcome center information desks. Currently there are no plans to staff additional welcome centers with state travel office staff. There are several visitor centers throughout the state which are staffed and financed by local tourism organizations.
LA	1,906,913	Visitor figure is obtained through voluntary registration which is promoted by each travel counselor.
ME	961,000	There is a vehicle counter at one location; manual counts are made at the others. *Locations not funded by Travel Office are Bangor, Bethel, Fryeburg, Old Town, and Machias. These five centers are operated by the Maine Publicity Bureau, a not-for-profit, membership-based corporation that provides statewide tourist information services on behalf of the tourism industry and the state of Maine.
MD	1,291,633	This figure is derived from a hand count from January to June and then with electronic counting devices in eight centers and hand counting in 2 centers. Centers are planned for three more locations in Maryland; two locations presently in operation are getting new buildings in 1990. *Seven contract centers. **SHA pays for construction.
MA	3,000,000	Welcome center staff provide visitor counts each month.
MI	1,981,037	The visitor figure is obtained by electronic counter of number of vehicles. Visitor numbers have changed due to new method of collecting data.
MN	2,116,572	We use electronic door counters at all state-owned Travel Information Centers (TIC). Occasional Vehicle Surveys are conducted by the Department of Transportation at highway TICs. *There are 10 highway welcome centers, and a walk-in tourism office center. Minnesota TICs are located within safety rest area facilities, which the Department of Transportation constructs and maintains. Worthington TIC and MN/IA border US 59 MN 60 to be completed fall 1989. St. Cloud TIC on US 10 to be completed fall 1990. Local communities generally serve the public with travel/tourism centers, either from their Chamber of Commerce or a separate facility in a convenient drive-in location (usually at the edge of town). A number of cities have year-round TICs, but most concentrate on summer vacation travelers. All receive local funding.
MS	2,200,000	Tabulation of completed Welcome Center registration forms. New full-service Welcome Center to be located on Highway 78 in Itawamba County near the Alabama state line.
MO	809,311	The visitor figure is obtained through contact with welcome center staff.
MT	N/A	Welcome centers are funded locally by Chambers of Commerce, convention and visitors bureaus, and private organizations.
NE	250,000	Our visitor count is based only on those visitors that our guides have personally talked with. All centers are funded by the Nebraska Roads Department. We only provide staffing.
NV		Our new center does not have visitor volume data at this time. *No direct funding, provide literature only.
NH		We do not compile visitor volume data.
NJ	6,504,700	Visitor sign-in books; clicker counts, and State Park visitor counts. We are currently negotiating a new welcome center adjacent to the State House in Trenton, NJ. A temporary facility at the Airport Plaza in Hazlet, NJ will service the Bayshore area until construction is completed. Negotiating establishment of 3 tourist information booths at Newark Airport.
NM	588,948	The visitor figure is counted from guest-register signatures which include the number of people in travel party.
NY	N/A	Data on visitor traffic is not available, as not all welcome centers collect statistics, or estimate them differently. *No current information available. This is 1985/86 data. **State provides hospitality training, state literature and match funds for local/regional collateral. Matching funds are frequently used for the production of brochures which are distributed at information centers.
NC	8,000,000	The visitor figure is obtained through the use of vehicle counters. The total number of cars per month is multiplied by the average number of people per car (estimated at 2.7). The Department of Transportation is responsible for welcome center property maintenance and upkeep. Three private centers are currently under construction.

WELCOME CENTERS — TABLE 2

State	Visitor Volume in 1988 at All Welcome Centers	How is the Visitor Volume Figure Obtained? Explanatory Notes
ND	39,040	The visitor figure is obtained through head counts. Four new centers were authorized by the 1989 legislative session. They will be constructed in 1990-91 in Grand Forks, Fargo, Bowman and Williston.
OH	500,000	The visitor figure is a seasonal estimate based on contact with welcome center staff via registration and door counter. A full-time welcome center will be opening in Scioto County summer of 1992. *Gateway Centers. Local organizations have community centers.
OK	1,239,111	An electronic counter is located at each center entrance to count all visitors entering the center. Two new centers are planned for 1991 to replace existing centers. Planning and construction for one center is funded by DOT; the other is funded by the Tourism Department from capital funds provided by the legislature. There are five visitor centers that are operated independently by a city and/or an organization with the department providing $10,000 in funds for operations at only one of the centers. The tenth center operated by the department is located in the State Capitol.
OR	500,000	Welcome center visitor counts are done by the center staff. Two additional centers are planned. One will be in eastern Oregon, which will be modern structure with hand crafted furniture and art inside; the other is in the Portland area on I-205, but construction has been delayed until 1991-93. *Chambers of Commerce provide funding at three locations.
PA	604,291*	*This figure represents travel parties served and/or those who have contact with welcome center staff. A "travel party" can be one couple, one carload, or one bus of travelers.
RI	300,000	The visitor figure is obtained from sign-in sheets from our own center and estimates from other centers. Two small centers are operated by the State Department of Environmental Management on a seasonal basis. Newport County CVB operates a new welcome center entrance to city.
SC	5,300,000	The visitor figure is calculated by vehicle counter times the average number of people per party, as noted on each register at each center.
SD	206,000	The visitor figure is obtained through voluntary registrations at all welcome centers.
TN	10,015,980	The visitor figure is obtained from vehicle counts. An eleventh welcome center on I-40 in Cocke County (East Tennessee) is under construction and is planned to open after July 1990.
TX HWYS	3,330,069	This figure is obtained from daily tabulation sheets which are completed by the welcome center staff, who count the number of visitors to each center on a daily basis. Monthly and annual reports are derived from the daily tabulation sheets. *Another division in the State Dept. of Highways and Public Transportation (the Maintenance and Operations Division) provides funds for the construction of new facilities. Depending on the location of the welcome center (i.e., interstate highway), federal funds may also be used. No new sites for welcome centers are planned at this time. However, a new facility for the Denison Tourist Bureau is planned for FY 1990.
UT	482,624	The visitor figure is obtained by electronic eye counters.
VT	645,000	The visitor figure represents estimates from registrations and walk-in counters.
VA	2,576,800	Count includes only visitors with whom state travel counselors interact. Estimate is based on the number of parties counseled, multiplied by an average party size figure for welcome centers. There are 28 regional/local visitor information centers throughout Virginia. The centers receive training from the Division of Tourism. However, all operating costs of these centers are funded by the region or locality.
WA	316,879	Travel Counselors use a monthly report form to record number of people in party. They submit this form to the state tourism office each month. *We also have some regional centers that receive a small amount of funding through our matching funds program. **We normally do not provide funding for property maintenance except for two centers. We have a total of 169 visitor information centers in Washington. These include our nine official state visitor information centers, regional centers and centers operated by chambers of commerce, visitor bureaus, counties, cities, etc.
WV	2,149,931	The visitor figure is obtained from contact with highway welcome center staff who do daily counts.
WI	1,475,825	Visitor figure only includes the state-operated information centers. *There are 7 highway welcome centers and 2 urban centers located in Chicago, IL and Madison, WI.

State	Visitor Volume in 1988 at All Welcome Centers	How is the Visitor Volume Figure Obtained? Explanatory Notes
WY	767,163	The visitor figure is obtained from automatic and manual counters, went in and computed at main office. No state welcome center planned or under construction at this time. Some cities, counties, etc., have their own welcome centers. Above figures are computed from state welcome centers only.
AS		American Samoa is an Island Territory of the United States. There are no highways linking AS with other states.
GU		"GVB's proposal has received legislative approval to construct a visitor center that will also house GVB's administrative offices and police substation. The proposal is pending approval from the Governor.

APPENDIX A:
DESCRIPTION OF BUDGET CATEGORIES

The following categories were used by state travel offices as a guideline in preparing breakdowns of the two budgets covered in this survey. Not all categories are applicable to every state. States could also report additional expenditure categories, which appear under "Other " in the budget breakdown tables.

Personnel Services	Salaries, fees, fringe benefits, etc.
Administrative Costs	Rent, utilities, travel, etc.
Advertising: Media Purchase	TV, magazine, newspaper, radio, etc. U.S. and foreign advertising costs
Advertising: Production	Costs related to producing the U.S. and foreign advertising in "Media Purchase"
Printing and Production	Costs of all printed materials (e.g. fulfillment/direct mail pieces, consumer or trade show materials, resource manual)
Inquiry Fulfillment	Costs to service and fulfill trade/consumer advertising inquiries (postage, 800 numbers)
Promotion, Press and Public Relations	Trade shows, consumer shows, package tours, Fam tours, press releases and conferences, travel writer tours, etc.
Research	Research conducted in-house or contracted with a university or a private firm
Matching Funds Program	Promotional programs (e.g. cooperative advertising) where state funds match private monies through a matching formula
Direct Grants	One-time, non-matching grants designated for specific projects (e.g. capital outlays, advertising, promotion or development)
Welcome Center Construction	Construction, major repair or renovation of welcome or information centers to which travel office provides funds
Welcome Center Operation	Staff, training, internal furnishing & upkeep, literature, or other operating costs of centers to which travel office provides funds

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